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ABSTRACT

This guide describes the partnerships created by the Bay State Skills Corporation, which successfully united more than 100 people from government, education, and the private sector to train 332 people for jobs averaging $6.27 per hour to start; it also provides guidelines for establishing similar programs. The guide contains seven chapters. The first chapter describes the creation and management of the Bay State Skills Corporation (BSSC), while the second chapter compares the BSSC to the Job Training Partnership Act (JTPA). In the third chapter, the demonstration program is described and the proposal solicitation process is outlined. In Chapter 4, the benefits of active employer involvement for training agencies, employers, and trainees are described; in Chapter 5, possible approaches to program design are explored. Chapter 6 describes the development of the model, and the final chapter, program implementation. The step-by-step description of the BSSC program provides examples and guidelines for other program developers to follow. The second half of the guide is an appendix containing case studies of the specific programs carried out in the various regions of Massachusetts. Information on development, funding, number of persons served, and replication issues is provided for each program. (KC)

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# Partnerships in Training

## A Handbook for Program Developers

Prepared by
The Bay State
Skills Corporation

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The Bay State Skills Corporation is an economic development tool which works to provide education and industry partnerships for the skilled labor needs of high growth, emerging or traditional Massachusetts companies where knowledge-intensive education and training is necessary.

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# Partnerships in Training

## A Handbook for Program Developers

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Our thanks go also to the Office of Training and Employment Policy which administers the JTPA program for Massachusetts, for encouraging the Service Delivery Areas to take part in this venture. And to the SDA's and their myriad private sector partners that together showed that joint training initiatives are a good avenue to an appropriately skilled workforce.

Lastly, thanks to the support staff of the BSSC for lending their technical skills and perseverance to seeing the manual through to completion. Also at BSSC, thanks to Maureen O'Hare, Director of Marketing and Communications, for her inspiration and editorial assistance and to Susan K. Moulton, the Executive Director, for her leadership style—willing to take risks, believing that this demonstration project had merit and that change is possible.

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# Foreword

When the Bay State Skills Corporation came into existence in Massachusetts in 1981, public/private partnerships were something of a radical idea. Skeptics said that schools, colleges and community based organizations would never be able to obtain matching grants from business and industry to train people for jobs. Over the years, we have proven the skeptics wrong — businesses have provided more than equal match for skills training programs ranging from entry level word processing to advanced microwave engineering, and much in between. Industry participation seems to be predicated upon the training being provided in a growth occupation where there is a shortage of skilled labor.

Next, the skeptics said that industry would never participate as equal partners in training programs for the disadvantaged. So BSSC set out to demonstrate that business and industry are more concerned with the skills of the labor force than with its demographics. The purpose of this manual is to set forth our experiences in demonstrating this belief, and to share the technical know-how we have accumulated in the process.

# The History of Bay State Skills Corporation

The Bay State Skills Corporation is a quasi-public corporation governed by an 18-member Board of Directors which represents the employment interests of the Commonwealth of Massachusetts' business, labor, education, and government organizations. Founded in 1981, the Corporation falls under the Executive Office of Economic Affairs but is not subject to its direct supervision or control.

BSSC's mandate is to produce a closer working relationship between the state's educational system and the private sector. The Corporation hopes to accomplish this goal by providing financial support, in the form of grants-in-aid, to educational and training institutions which join with one or more private companies to provide specific skills training and placement prospects.

The Corporation provides direct support to institutions for a specified training program. As such, BSSC funding is designed to pay for specific skills training. Equally important, BSSC funding is designed to expand the training and education capacity of the state's institutions. As a result of BSSC funding, training institutions increase their long term ability to deliver state-of-the-art training. The Corporation hopes that by encouraging a joint cooperation between education/training and industry, its support will eventually no longer be needed, and that business and training agencies will realize the mutual benefit of working together and will pursue cooperative relationships on their own, without Corporation support.

Simply stated, the Bay State Skills Corporation's mission is to fill *"skill gaps"* by providing growing companies with the appropriately skilled and trained people. In the late 70's there was pervasive frustration and concern over the lack of communication between schools, training agencies and the private sector. At that time, there was a mismatch between the skills being taught in the schools and the jobs that were available to students when they graduated. Corporate executives were concerned about obsolete worker skills, sagging productivity and the impact of changing technology on the work force. Educational institutions needed help to keep up with the changing technological equipment and expertise necessary for state-of-the-art training. Because business and education had not been coordinating their efforts, educators were not teaching what business needed, and businesses were resorting to pirating skilled employees from each other. As a result, there was serious concern that the economic growth of the Commonwealth of Massachusetts would be stunted if a dialogue could not be opened between government, education and industry to address the problem. In 1981 the Bay State Skills Corporation was established as part of the solution.

BSSC attempts to open this dialogue by funding training programs on the basis of merit. The Corporation requires that companies participate financially and programmatically in each grant by giving staff time and expertise, equipment, space, or any number of contributions which can make the program more directly responsive to business and industry's needs. Business is expected to participate not just out of a sense of community spirit, but from the perspective of enlightened self interest. In the opinion of the Bay State Skills Corporation, the active participation of the private sector provides the best guarantee available that the occupation selected for training is in demand, that the skills are relevant to employers' needs and that the quality of training will be state-of-the-art.

# The Creation of the Bay State Skills Corporation

In his 1980 State of the State address, the Governor of Massachusetts announced a plan to pull together educators, business and labor leaders, training specialists and government officials to create a quasi-public corporation which would help employers meet their needs for skilled people. The Secretary of Economic Affairs proposed a program that would sponsor training on an entry level through upgrading, as well as advanced university level technologies. Unlike Federal programs, BSSC would not be restricted to training only the unemployed or the poor. Because employers' major criteria are skilled workers, BSSC would focus on training people for jobs, regardless of the economic need of the trainees.

The first attempt to create the Corporation did not make it through the legislative process. Legislators believed that the federal jobs training program and the Commonwealth's system of vocational schools, community colleges, colleges and universities should be adequate to meet the needs of business and industry for skilled personnel. They were also skeptical of the potential for education and industry to work cooperatively. Undaunted, the Governor was determined to give the concept a trial run, and provided $500,000 from his emergency reserve funds to create the Bay State Skills Commission. During 1980 the Commission funded 15 programs in which the state's $500,000 were more than matched by $800,000 in private sector contributions of staff time, equipment, and space.

The success of the initial pilot project demonstrated that public private partnerships could work. Business and education did work cooperatively to increase the supply of skilled labor and improve the training capacity of schools. With an infusion of funds from outside the annual budget allocations, the education and training institutions of the state had the opportunity to expand and modernize their course offerings. The Governor and Secretary of Economic Affairs returned to the Legislature in 1981, and this time were successful in getting the Bay State Skills Corporation established with $3 million in funding. The bill received widespread support in the State Legislature, particularly from the Joint Committee on Commerce and Labor and the House and Senate Ways and Means Committees. On July 21, 1981 the Bay State Skills Corporation was signed into law and given the following mandate:

- To encourage and facilitate the formation of comprehensive cooperative relationships between business, industry, labor, government and education, and thereby develop and expand programs of skills training that are consistent with employment needs;
- To provide grants-in-aid to educational and training institutions to fund skills training programs consistent with employment needs, to be matched with equal private sector financial support;
- To collect and disseminate information on present and future employment needs as well as the availability of skills training and education in these areas; and
- To conduct conferences and studies which will increase communication and information on employment needs of the Commonwealth.

# Corporate Organization and Management

When the Bay State Skills Corporation was created it was placed within the Secretariat of Economic Affairs. As a quasi-public corporation, it retains fiscal autonomy and an organizational structure independent from the rest of state government. The Executive Office of Economic Affairs serves as a fiscal conduit for the annual budget appropriation from the state, but otherwise it has no management authority or responsibility for the actions of the Corporation.

The Board of Directors is the formal governing body of the Corporation. Of the 18 Member Board of Directors, four are mandated law with the remaining 14 appointed by the Governor from business and industry, labor, education, and government. The four mandated members are:

***The Chancellor of the Board of Regents of Higher Education,*** *which oversees the public colleges, universities and community colleges.*
***The Commissioner of Public Welfare;***
***The Commissioner of Education,*** *which oversees Massachusetts elementary, secondary and vocational schools; and*
***The Secretary of the Executive office of Economic Affairs,*** *which also houses the state administration of JTPA. The Secretary of Economic Affairs customarily presides as Chair of the Board, although by law the Governor may appoint any of the existing 18 members to the position.*

Through its Board of Directors, BSSC maintains formal relationships with other state agencies which are involved with employment and training issues. The Board meets quarterly to approve grants-in-aid, to set policy, and to establish direction for the Corporation, not unlike the function of the Private Industry Council under JTPA.

The allocation from the state budget comes to BSSC in one lump sum, which makes the authority to spend autonomous and strengthens the policy making role of the Board. The enabling legisla-tion provides no mandates as to the rate of spending, nor does it single out specific industries or special target groups for levels of service.

An Executive Director of the Corporation, who is hired by the Board, is responsible for developing and implementing personnel policies and staffing requirements. The Bay State Skills Corporation is not subject to Civil Service or other government personnel policies in staff hiring, firing, promoting, or salary and benefit determinations.

The Corporation began in 1981 with an initial staff consisting of an Executive Director, Assistant Director, Secretary and student intern. By 1984 the Corporation had grown to a staff of 22 who are responsible for corporate management, fiscal controls, marketing, developing new programs and providing technical assistance to funded programs. This staffing level has held fairly constant for several years. With an annual allocation of $4.7 million dollars from all sources, the Corporation funds approximately 100 contracts a year for skills training.

BSSC is attentive to its need to create a positive public image as an organization that can make things happen. As soon as the Board of Directors approves a round of proposals, press releases are prepared and sent to every media outlet with an audience in proximity to any of the programs funded. At the same time, legislators receive personal letters informing them about BSSC activities which are taking place in their districts. This responsibility is a staff function built into the routine operations of the organization. All contractors are also encouraged to bring their programs to media attention by hosting an open house, a ribbon cutting, a graduation, or an awards ceremony for their private sector partners. The Corporation trains new contractors and provides technical assistance to project coordinators on how to go about doing this.

BSSC devotes such attention to public relations because companies are selective about what activities or organizations they will become involved with. A good public relations strategy provides corporate partners with a sense of being a part of a larger effort. Participation with these programs brings prestige and recognition to industries as well as helping them meet their bottom line needs of profitability through an effective, efficient labor force.

*Providing awards to contractors and their private sector partners is good public relations.*

# Job Training Partnership Act by Comparison

The Job Training Partnership Act of 1982 continues a longstanding Federal commitment to train people who suffer from serious barriers to employment. It follows in the tradition of CETA, MDTA, and the WPA of the 1930's. Key features of JTPA are:

- Local responsibility for planning and delivering services;
- Coordination with education, economic development and human service agencies in the state;
- Private sector participation in programs through the Private Industry Councils (PICs);
- Emphasis on training, and limited funds for administration, support services, and stipends; and
- Services only for designated target groups such as economically disadvantaged adults, dislocated workers, older workers, youth, etc. in accordance with federally established guidelines.

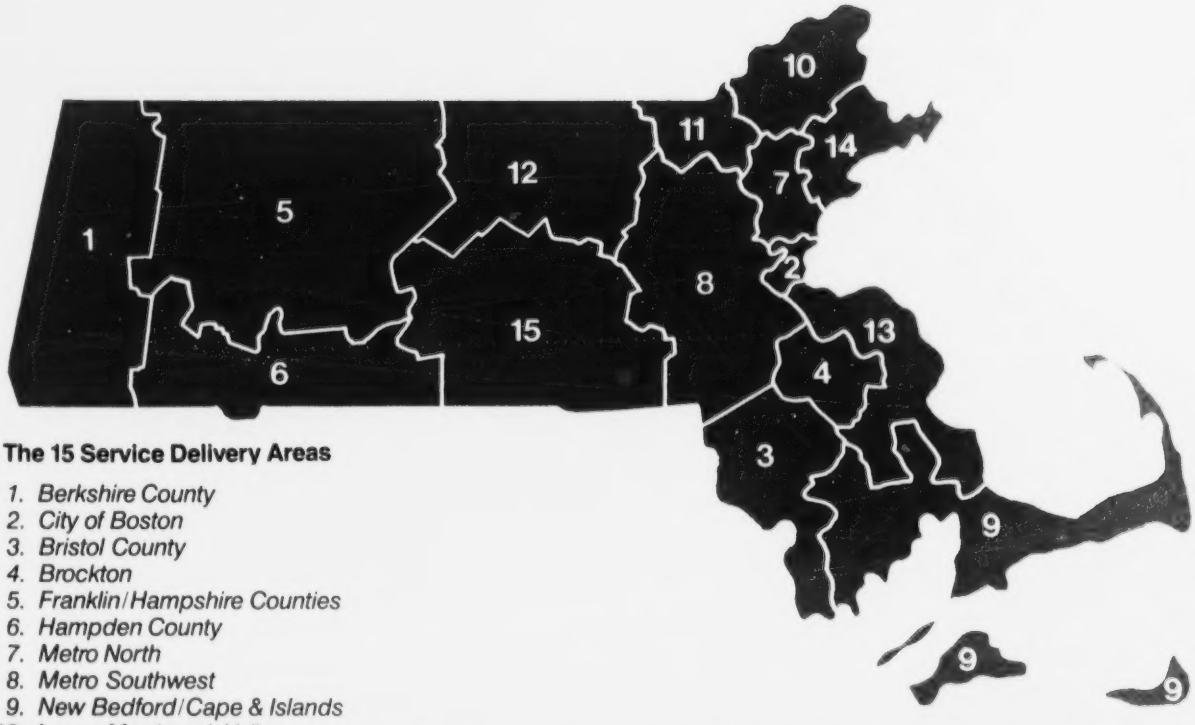
Each state is responsible for establishing policy, developing performance standards, and designating the geographic boundaries of Service Delivery Areas through which the local Private Industry Councils can deliver employment and training services to eligible people.

Each Private Industry Council must enter into a formal agreement with the local government for the implementation of JTPA within a designated Service Delivery Area, including procedures for developing plans, the selection of grant recipients and program administrators, and the adoption of a final plan and budget.

The kinds of services that may be provided to eligible people are varied, including on-the-job training, classroom skills training, remedial education, job search assistance and counseling.

The ultimate goal of these services is to assist disadvantaged people in finding permanent employment which enables them to become economically self-sufficient. Service Delivery Areas must develop service plans for individual enrollees which involve one or many of the above services, depending on the background and needs of the client.

Within Massachusetts there are fifteen separate Private Industry Councils and their corresponding Service Delivery Areas (SDAs), which range in size and nature from the City of Boston, a single city SDA, to Berkshire County, a thirty town rural SDA.




**The 15 Service Delivery Areas**

1. *Berkshire County*
2. *City of Boston*
3. *Bristol County*
4. *Brockton*
5. *Franklin/Hampshire Counties*
6. *Hampden County*
7. *Metro North*
8. *Metro Southwest*
9. *New Bedford/Cape & Islands*
10. *Lower Merrimack Valley*
11. *Northern Middlesex*
12. *Northern Worcester*
13. *South Coastal*
14. *Southern Essex*
15. *Southern Worcester*

The administrative structures for delivering services are quite varied. In some, all functions including administration, client support services, training and placement are handled directly by the Service Delivery Area. Three Massachusetts Service Delivery Areas use their own skills centers, built under CETA, as an alternative to vocational schools or community based organizations for the delivery of training. Other SDA's release their training funds for competetive bid, but retain the grant administration, client recruitment, assessment, counseling and job placement functions within their agency. In other SDAs everything except grant administration is contracted to vendors: sometimes a single vendor is responsible for serving a client from recruitment through training to placement, and sometimes each of these functions is handled by different vendors, with the client being referred from one to another. All of these delivery systems are consistent with the Job Training Partnership Act. They follow from the structures that have evolved over decades of experience with manpower programs.

The major ingredient that has been missing over years of manpower administration has been coordination with the private sector which is, after all, the final consumer of any manpower program's products. By establishing Private Industry Councils the United States Congress attempted to improve the coordination of public and private sectors in the area of manpower planning and policy development. Another step is needed, however, beyond having executives advise the employment and training system about how best to spend its Title IIA allocation.

In order to create a job training system that is responsive to the private sector labor market, companies should actively participate in the nuts and bolts of the delivery of services.

## How Does BSSC Differ?

BSSC has many points of similarity with JTPA and many differences. Unlike JTPA, BSSC training is open to the general public — there are no income eligibility requirements, no target groups and no formula allocations to geographic areas. Programs can cross fiscal years and can vary in length from as little as six weeks to as much as eighteen months. Training can be for entry level skills such as machining or word processing or for advanced careers such as microwave engineering or biotechnology. This flexibility has made the Bay State Skills Corporation very popular with both business and education, but it is not particularly relevant to or replicable by the JTPA system.

Other features of BSSC, however, are very relevant to JTPA. The Corporation maintains a central office which is responsible for setting policy, funding programs and overseeing their effectiveness. It maintains no field offices or standing programs, so it can provide a quick response by adding or dropping programs as local needs change.

Four times a year the Bay State Skills Corporation releases a Request for Proposals to non-profit education and training institutions which can demonstrate their ability to train individuals for long term employment within growth sectors of the economy. Educational institutions must link with one or more private companies to create specific skills training proposals which demonstrate not only their ability to deliver quality occupational training but also that the training institutions themselves will derive some long term benefits in the form of increased capacity to deliver skills training from the funding.

When proposals are submitted they are each read and scored by the BSSC professional staff against standardized criteria. From time to time BSSC has debated the value of bringing in "expert readers" in technical subject areas, but the agency has learned that the quality of private sector participation, as documented in letters submitted with the proposal, provides the best guide to the technical strength of the curriculum.

Professional staff make recommendations to the Corporation Board of Directors, which approves every grant-in-aid. After approval, successful bidders are invited to negotiate contracts in which the details of program operations are finalized to the mutual satisfaction of all parties. Not until this entire process has been completed may an agency begin to operate a program.

Once a proposal has been approved for funding, it is assigned to one of the Corporation's professional staff for ongoing technical assistance and guidance. The Bay State Skills Corporation believes that active involvement with programs is an essential ingredient in their success. This means that all contractors are trained on reporting requirements, their relationship with BSSC, publicity and marketing techniques, and project management standards. Thereafter, a Program Specialist visits each program at least once every six weeks, and contractors provide bimonthly written progress reports on their enrollment, relationships with the private sector, progress in training and placements. Upon completion, each Contractor and BSSC Program Specialist writes an evaluation of the strengths and weaknesses of the program which is used by the professional staff as they develop new programs. This active involvement on the part of the Bay State Skills Corporation with the operations and standards of performance creates a "Hawthorne Effect" on programs, improving the outcomes and the willingness of program managers to be creative and take risks on innovative approaches.

*Chapter Three*

# The Demonstration Program

By 1984, while the Job Training Partnership Act was still getting its figurative feet wet, the Bay State Skills Corporation had come to the attention of the Department of Labor. This program seemed to embody much of what Congress had hoped to achieve through the public/private partnerships mandated in the JTPA legislation. Using state resources, the Bay State Skills Corporation was funding training programs that were bringing the private sector into active participation in the design and delivery of training. In fact, BSSC was requiring training agencies to obtain dollar for dollar match from the private sector in order to receive a grant. In its first three years the Corporation committed $6 million dollars for 76 programs which worked with 300 companies to train 5,700 people.

BSSC training efforts were industry driven. For a program to receive BSSC funds, companies had to be in need of individuals with these skills. Training institutions were required to illustrate the local labor market opportunities and demonstrate how industry would get involved in preparing people for work. Until this time, there had been a lack of market orientation in many training and education institutions.

Despite the successes of the Bay State Skills Corporation in obtaining private sector participation in its programs, Service Delivery Areas across the country were finding it difficult to obtain the participation of business and industry in their job training efforts. The Bay State Skills Corporation agreed to an experiment to see whether its private sector matching grant model for developing and expanding programs of skills training consistent with employer need would work within the Private Industry Council (PIC) Service Delivery Area (SDA) system established under the Job Training Partnership Act (JTPA). In addition, BSSC agreed to develop a Replication Manual to be used by state JTPA staff and national officials interested in adopting the matching grant model for their jurisdictions.

Over the 18-month demonstration period, the BSSC received from the United States Department of Labor (DOL) approximately $560,000 to make available as challenge grants to the Private Industry Councils in Massachusetts. The grants-in-aid were specifically designed to fund the development and expansion of programs of entry level skills training consistent with employer need, through an application of the BSSC matching grant model (described below). The trainees to be served were those eligible to receive services under Title II-A of JTPA. The BSSC used its bid (Request for Proposal—RFP) process to make its funding determinations. Selection of programs depended on the quality of the program design and the participation of local industry. Twelve grants-in-aid were awarded to seven PIC/SDA bidders as a result of their direct application for the funding.

BSSC provided both training and technical assistance to Service Delivery Area staff on the BSSC model and how to develop partnership programs. Programs were monitored for contract compliance, and ongoing technical assistance was provided to assure the quality of those programs funded.

# The BSSC Model

The key elements of the BSSC model to be duplicated were:
**1:** that funds be used exclusively for the development or significant expansion of programs of skills training or education consistent with the demonstrated employment needs of the private sector,

**2:** that programs be designed to prepare individuals upon completion for employment in a specific trade, occupation or profession;

**3:** that the Service Delivery Area demonstrate that it had a matching commitment of financial support (including cash, equipment, facilities, personnel and/or scholarships) from the private sector to the program at least equal to or greater than the amount of the requested grant-in-aid, and,

**4:** that the private sector participation be active and include one or more of the following: recruitment and selection of trainees; development of curriculum; loaned instructors; donations of material and equipment, etc.

## Proposal Solicitation

BSSC solicited proposals through the use of an RFP. For most SDAs partnership programs were a departure from their usual training model, so ample time was allowed for outreach to the private sector. During the start up phase, BSSC visited each of the SDAs to provide technical assistance in assessing employer needs and securing and using private sector support to design a training course with their substantial programmatic participation.

The Request For Proposals used in this demonstration was based on the matching grant program which required contributions from the private sector equal in value to the cash provided by the Bay State Skills Corporation. It was modified to restrict eligibility for funding to Massachusetts Private Industry Councils/Service Delivery Areas, and to require all trainees to be eligible for services under Title IIA of JTPA. Basic elements of the BSSC Request For Proposals are shown here:

***A. Program Need***

*Describe what occupations you plan to train for; the existing labor supply and demand picture in your area; the nature of the occupational shortages in your area and how you propose to address these shortages through your training program. The choice of an occupational area and level of training must be based on your investigation of the local labor market and direct input from businesses. The needs or shortages of specific companies should be cited.*

***B. Work Statement***

**1.** *Describe the nature of the training program you intend to provide; identify the specific occupation you intend to train for and include a job or task description of the occupation; include a profile of your proposed training population by age, race, sex, previous employment and/or educational status. Describe how you intend to identify, recruit and screen the proposed trainees and what skills will be required for entry into the program.*

**2.** *Identify the location of your training program, the length of the program, and the number of days, hours per day, and hours per week that the trainees will spend in training. Identify*

*the training curriculum and materials, the use of instructors, equipment/machinery, the relationship between training in the classroom and hands-on training. Tie in these program details to the specific skills required for the occupation you are training in.*

**C. Private Sector Participation**

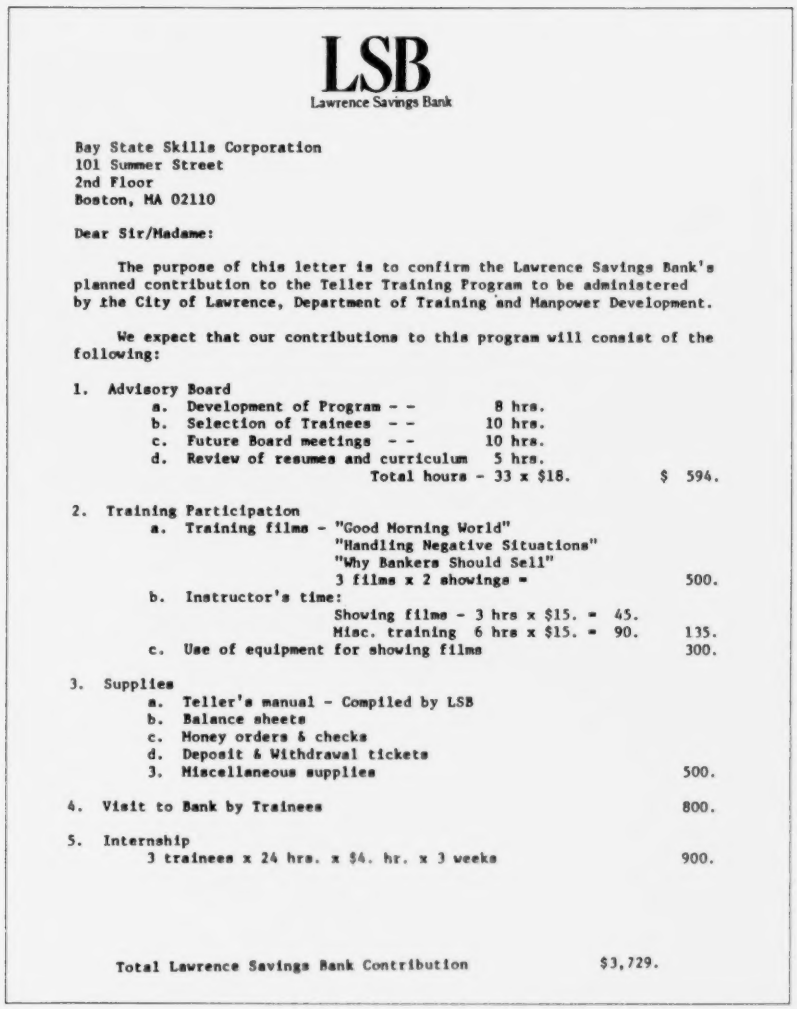
**1.** *Identify the names and locations of those businesses and private organizations that you intend to work with. Identify how your organization and the company(ies) you have linked up with will work together in the areas of:*

- *development of the training curriculum;*
- *hiring commitments;*
- *monitoring of the program;*
- *planning for and participation in job placement efforts;*
- *recruitment and selection of trainees; and*
- *the conduct of the actual training program itself.*

*In addition, you should fully describe the nature of the financial participation of the company(ies). While the budget section of the proposal will outline the actual financial participation, you should use this section of the narrative to describe the joint cooperation as explicitly as you can. The Corporation is most interested in understanding the nature of this joint public/private venture. The Private Sector Commitment Letter(s) should reinforce and support this narrative. The Corporation will look very closely at the level of joint participation with the private company(ies) involved. The private sector financial share must be at least equal to the amount requested from the Corporation. This contribution should be specific, detailed, and documented in Private Sector Commitment Letter(s).*

**D. Placement Goals and Plans**

*A critical aspect of BSSC programs is the placement of trainees into training-related jobs in the private sector upon program completion. All programs must describe their process of job development and placement and set specific goals for numbers to be placed. BSSC asks that you realistically consider other potential outcomes of your program (e.g., non-placements, such as trainees returning to school, incompletions, etc.). BSSC performance standard is 70% training-related placements. Be specific about which companies you expect to hire the graduates of your training program.*



LSB
Lawrence Savings Bank

Bay State Skills Corporation
101 Summer Street
2nd Floor
Boston, MA 02110

Dear Sir/Madame:

The purpose of this letter is to confirm the Lawrence Savings Bank's planned contribution to the Teller Training Program to be administered by the City of Lawrence, Department of Training and Manpower Development.

We expect that our contributions to this program will consist of the following:

| | | |
|---|---|---|
| 1. Advisory Board | | |
| a. Development of Program - - | 8 hrs. | |
| b. Selection of Trainees - - | 10 hrs. | |
| c. Future Board meetings - - | 10 hrs. | |
| d. Review of resumes and curriculum | 5 hrs. | |
| Total hours - 33 x $18. | | $ 594. |
| 2. Training Participation | | |
| a. Training films - "Good Morning World" "Handling Negative Situations" "Why Bankers Should Sell" 3 films x 2 showings = | | 500. |
| b. Instructor's time: Showing films - 3 hrs x $15. = 45. Misc. training 6 hrs x $15. = 90. | | 135. |
| c. Use of equipment for showing films | | 300. |
| 3. Supplies | | |
| a. Teller's manual - Compiled by LSB | | |
| b. Balance sheets | | |
| c. Money orders & checks | | |
| d. Deposit & Withdrawal tickets | | |
| 3. Miscellaneous supplies | | 500. |
| 4. Visit to Bank by Trainees | | 800. |
| 5. Internship | | |
| 3 trainees x 24 hrs. x $4. hr. x 3 weeks | | 900. |
| Total Lawrence Savings Bank Contribution | | $3,729. |

A corporate match letter should specify all forms of the company's participation in a training program.

## Criteria For Selection

The goal of this project was to demonstrate to the Service Delivery Areas how to design and deliver training in conjunction with the private sector. All programs which met the design criteria were selected for funding. Sometimes this meant that a proposal was rejected the first time it was submitted, but BSSC provided technical assistance to the bidder in order to help them redesign it to meet the funding criteria. All proposals were read and scored by at least three people who made recommendations to the BSSC Board of Directors. The selection criteria provided for the award of up to 100 points as follows:

| | |
|---|---|
| Previous Experience | 5 points |
| Need for the Program | 10 |
| Clarity of the Design | 5 |
| Quality of the Design | 15 |
| Characteristics of Trainees | 10 |
| Programmatic Private Sector Participation | 20 |
| Financial Private Sector Participation | 10 |
| Placement Goals and Strategy | 15 |
| Budget | 10 |

As can readily be seen, the selection criteria are heavily weighted toward programs with good quality participation from the private sector. The scoring was designed so that a score of 50 described a satisfactory proposal, and reviewers' comments were included in contract negotiations.

# Training

Altogether there were 12 training programs operated in this demonstration. They are described in detail in the Case Study section of this manual. The following chart summarizes the SDA operations in the demonstration.

| # Of Trainees | Training Occupation | Service Delivery Area | Grant Award | Private Match | Participating Companies |
|---|---|---|---|---|---|
| 18 | Word Processing | Berkshire Training & Employment Program | $26,220 | $26,459 | Sheaffer Eaton Textron, Berkshire Life Insurance, Kay Bee Toys, General Electric Company, Sprague Electric Company |
| 13 | Unit Clerks | Boston Office of Jobs & Community Service | 33,883 | 33,658 | New England Medical Center, University Hospital, Brigham and Women's Hospital, Veterans Administration Medical Center |
| 63 | Medical Clerical Skills | Boston Office of Jobs & Community Service | 82,970 | 93,048 | New England Medical Center, Mount Auburn Hospital |
| 14 | Electro-Mechanical Technician | Hampden County Employment and Training Consortium | 40,000 | 63,500 | A.B. Dick, Company, Baybank Valley Trust, Digital Equipment Corporation, Hampden Engineering, Titeflex Corporation, Easco Hand Tools, General Electric Company |
| 17 | Computer Numerical Control Machine Operators | South Coastal Career Development Administration | 57,140 | 70,140 | Boston Gear Inc., Pneumatic Scale Corporation, Merriman Corp., Methods Machine Tools, Inc., Mathewson Corporation, Triangle Engineering, Inc., and nine other machine shops |
| 15 | Office Practice in Banking | South Coastal Career Development Administration | 18,080 | 18,080 | Plymouth Home National Bank, Plymouth Five Cents Savings Bank, Myles Standish Credit Union, Baybank Southeast, State Street Bank, Information Technology, Inc. |
| 17 | Culinary Arts | South Coastal Career Development Administration | 51,035 | 77,730 | The Whiton House, Casa Berrini Restaurant, Sheraton Plymouth Inn, Teel's Cabin, South Shore Packing, Inc., Capeway Fish Market, The Great Escape |
| 41 | Nursing Assistant | North Shore Employment and Training | 57,341 | 79,007 | Shaughnessy Rehabilitation Hospital, Salem Hospital |
| 26 | Micrographic Camera Operator | North Shore Employment and Training | 65,991 | 69,213 | Information Protection Service, Bell & Howell, Essex Office Associates, Connolly Data Systems, Essexbank, Industrial Management Systems, Security National Bank, Parker Brothers, Eastern Savings Bank, Gillette Company, Sylvania, GTE |
| 15 | Computer Numerical Control Machinist | Office for Job Partnerships | 32,404 | 90,605 | Isotronics, Inc. Division of Augat Industries |
| 43 | Bank Tellers | Lawrence Department of Training & Manpower Development | 46,441 | 51,316 | Arlington Trust, Family Mutual Bank, Lawrence Savings Bank, Andover Savings Bank, Bank of Boston, First Essex Bank, Bank of New England |
| 37 | Nursing Assistants | Lawrence Department of Training & Manpower Development | 39,731 | 42,369 | Hillhaven Corporation |

# Trainee Enrollment Report

| Location | BTEP | Boston COTC | Boston ABCD | Hampden | Lawrence |
|---|---|---|---|---|---|
| **Occupation** | **Word Processing** | **Medical/ Clerical** | **Unit Clerks** | **Electro-Mechanical Technicians** | **Nursing Assistant** |
| **Cumulative Individuals Served** | 18 | 63 | 13 | 14 | 49 |
| **Individuals Completing Training** | 16 | 56 | 12 | 14 | 41 |
| **Total Job Placements** | 11 | 50 | 9 | 10 | 41 |
| *Training Related Job Placements* | 11 | 50 | 9 | 9 | 37 |
| **Cont. to School/Training** | 3 | 0 | — | 2 | 0 |
| **Dropouts and Others Not Placed** | 4 | 13 | 4 | 2 | 8 |
| **Total Terminations** | 18 | 63 | 13 | 14 | 49 |
| **Average Placement Wage** | 5.05 | 6.12 | 6.08 | 6.85 | 4.84 |
| **16–21** | 1 | 5 | 5 | 2 | 8 |
| **22–54** | 15 | 56 | 8 | 12 | 41 |
| **55+** | 2 | 2 | 0 | 0 | 0 |
| **Caucasian** | 18 | 0 | 2 | 14 | 8 |
| **Black** | 0 | 0 | 10 | 0 | 0 |
| **Hispanic** | 0 | 0 | 1 | 0 | 40 |
| **Asian** | 0 | 63 | 0 | 0 | 0 |
| **Other—** | 0 | 0 | 0 | 0 | 1 |
| **Male** | 1 | 5 | 0 | 13 | 3 |
| **Female** | 17 | 58 | 13 | 1 | 46 |
| **Unemployed** | 18 | 43 | 12 | 14 | 49 |
| **Employed** | 0 | 20 | 1 | 0 | 0 |
| **UI Recipient** | 5 | 3 | 0 | 6 | 2 |
| **Public Assistance Recipient** | 7 | 2 | 5 | 7 | 40 |
| **Displaced Homemaker** | 0 | 3 | 1 | 0 | 2 |
| **Handicapped** | 0 | 6 | 1 | 0 | 4 |

| Lawrence | South Coastal | Northshore | Northshore | New Bedford | South Coastal | South Coastal | TOTAL |
|---|---|---|---|---|---|---|---|
| Bank Tellers | Computer Numerical Control | Healthcare Assistant | Micrographic Camera Operator | Computer Numerical Control | Banking | Culinary | |
| 41 | 17 | 41 | 26 | 15 | 15 | 20 | 332 |
| 36 | 13 | 36 | 16 | 15 | 13 | 11 | 286 (88%) |
| 32 | 12 | 29 | 15 | 14 | 13 | 11 | 247 (74%) |
| 28 | 11 | 29 | 15 | 13 | 11 | 11 | 234 (95%) |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 |
| 9 | 5 | 12 | 11 | 1 | 2 | 9 | 80 |
| 41 | 17 | 41 | 26 | 15 | 15 | 20 | 332 |
| 5.25 | 6.79 | 5.05 | 4.65 | 6.65 | 6.50 | 5.50 | 6.07 |
| 9 | 3 | 7 | 5 | 0 | 3 | 0 | 53 |
| 34 | 12 | 34 | 20 | 15 | 11 | 20 | 274 |
| 0 | 2 | 0 | 1 | 0 | 1 | 0 | 10 |
| 26 | 15 | 32 | 25 | 14 | 14 | 18 | 186 |
| 7 | 2 | 5 | 0 | 1 | 0 | 0 | 25 |
| 7 | 0 | 4 | 1 | 0 | 1 | 2 | 56 |
| 1 | 0 | 0 | 0 | 0 | 0 | 0 | 64 |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| 0 | 15 | 3 | 12 | 13 | 2 | 3 | 75 |
| 41 | 2 | 38 | 14 | 2 | 13 | 17 | 262 |
| 41 | 16 | 40 | 21 | 11 | 15 | 20 | 300 |
| 0 | 1 | 1 | 5 | 4 | 0 | 0 | 32 |
| 4 | 4 | 0 | 2 | 0 | 2 | 11 | 39 |
| 20 | 4 | 21 | 9 | 1 | 4 | 6 | 126 |
| 2 | 0 | 4 | 1 | 1 | 3 | 3 | 20 |
| 0 | 2 | 3 | 26 | 2 | 0 | 0 | 44 |

## Outcomes

Of the fifteen Service Delivery Areas in Massachusetts, eight applied, and seven received funding for training programs. For many, this represented the first time they had approached the design of training with employers' needs as a priority, instead of client services. Each SDA had its own occupational priority in a variety of skill levels, ranging from Nursing Assistants to Electro-Mechanical Technicians. The length of training varied from eight weeks to thirty-six weeks.

Some started the project convinced that they could never obtain dollar for dollar match from the private sector—especially for training the disadvantaged. Yet every SDA that set out to obtain private sector participation in training was able to do so. Sixty-eight different companies participated in the training of 332 Title IIA eligible people. The kinds of participation also varied extensively: there were advisory committees; trainee selection committees; curriculum review committees; guest lecturers; internships (paid and unpaid); donated equipment; classroom and shop supplies; cash; and of course, jobs at the end of training. The people who were trained were all eligible for services under Title IIA, debunking the myth that employers won't have anything to do with services for the disadvantaged. The chart below displays the outcomes for the trainees in these 12 programs. To summarize, 332 people were trained; 244, or 73% of them were placed in training related jobs at $6.07/hour average starting wage. Their backgrounds were also typical of the most in need population served by JTPA: 126 or 38% were public assistance recipients, and 46% were minorities.

Beyond a series of 12 good training programs, what else did the SDA's gain from their participation in the demonstration grant? Some obtained expensive pieces of equipment, theirs to keep after the completion of training. A few took advantage of the opportunity to develop an entirely new course, never before offered in their area. Most importantly, the SDAs learned that it was possible to work with the private sector in an entirely different way than the policy advice that is ordinarily provided by the Private Industry Council. New relationships were formed, and several of the SDA's have continued to develop 50/50 matching grant programs with their JTPA Title II-A funds.

# Benefits of Active Employer Involvement

An SDA Director who participated in BSSC-DOL Demonstration Program once commented, *"Partnerships are like spinach: everyone says they're good for you, but nobody really likes them."* This chapter of the manual will be something like the nutritionist's report—it will enumerate what's good for you about partnerships, and show you why you'll like them if you try them.

Increasing the direct and active participation of employers in skills training requires a greater commitment of scarce staff time to plan and operate programs than does a traditional classroom skills training or on-the-job training program. Lip service is always given to the importance of employer participation but it is important to look beyond this, to see if there really is any benefit to it and to decide if the benefits outweigh the costs. The work of this Demonstration Grant has provided several examples in which the approach outlined in this manual has resulted in benefits to all the actors in the employment and training system. Specifically:

- Participating ***SDAs*** and ***training agencies*** can increase the effectiveness of their programs and/or reduce costs;
- Participating ***employers*** can increase the likelihood that the program will produce new employees who meet their needs;
- ***Trainees*** are more likely to receive relevant training and to obtain training-related placements.

In addition to this, the approach can provide demonstrable benefits to the community at-large through capturing jobs that may normally elude the JTPA system.

It should be noted that concerns are sometimes expressed that increasing the employer involvement in skills training may diminish JTPA's ability to serve those most in need. In some cases, the partnership training programs did serve a relatively well-educated segment of the JTPA eligible population. But the overall Bay State Skills Corporation experience shows that this does not need to be the case. Given the opportunity to participate in the selection of trainees, the private sector will be more concerned with the candidates' abilities to learn skills and good work habits than with their "significant segments" or "target group characteristics."

This chapter displays some of the benefits to Service Delivery Areas, employers, and trainees that the Bay State Skills Corporation has identified through its experience with the Demonstration Program.

## Benefits to SDAs and Training Agencies

The experience with the Demonstration Grant programs strongly suggests that when SDAs choose to increase the participation of employers in their Title IIA training efforts, they have the potential to substantially improve their performance—both in terms of the prescribed performance measures and more generally.

In many instances, the SDAs participating in the Demonstration Grant program elected to use vocational schools or skills centers as training organizations, rather than deliver the training themselves. Participating training agencies often derived clear and measurable "bottom line" rewards.

### Less Expensive Programs

Because of the design used by the Bay State Skills Corporation, all Demonstration Grant programs involved substantial contributions by employers, including time, materials, and/or equipment. In some cases, SDA funds would have been used for the programs had the employers not made the contributions. The fact that employers became involved allowed the SDAs to save money, and deliver an equivalent program for less money.

### Better Quality Programs

In other cases, the employer contributions represented enhancements to the training for which the SDA would not have paid. For example, SDAs do not generally pay for employer personnel such as shop supervisors to give lectures during classroom skills training programs. In these cases, the SDA spent the same money on the partnership program as it would otherwise have, but got more for that money.

### More Effective Programs

Employers are willing to make substantial contributions of time or resources to a training program, but only if they are convinced that it has been designed with their needs in mind. As a result, training programs that succeed in obtaining direct participation from employers are more likely to graduate trainees who will be hired by local business and industry.

### Increased Client Services

When employer contributions lower the total SDA cost per trainee, SDAs can serve more clients with the same size grant. As the private sector contributes space, equipment, supplies or other capital donations the SDA can reduce its support of these fixed costs and can allocate its resources to either serving more clients or providing more comprehensive support for the clients it already serves.

### Selecting Appropriate Trainees

When employers provide advice on the development of entrance criteria for training programs, SDAs are able to target their scarce resources to those trainees who are most likely to benefit from the program. It should be emphasized that "most appropriate trainees" is not a euphemism for creaming. In a number of instances, employers specified *lower* entrance criteria than the SDAs would have set without employer input. Sometimes SDAs, in their efforts to please potential employers, set standards for educational attainment or physical dexterity that have little bearing on job requirements. When employers provide details about job requirements it is easier for planners to design programs for remedial education followed by skills training that takes into account the characteristics of the client pool and prepares them for real jobs.

**Relevant Training Curriculum**

It is often difficult for SDA or training agency staff to know precisely what skills employers need in their entry level workers. Employers, on the other hand, are usually quite clear about the skills they are seeking, but they may not be aware of the educational process necessary to attain those skills. It is to no one's advantage to invest in a short clerical training program that produces typists at 40 words per minute if the local employers won't hire anyone who types at less than 60 words per minute. However, collaboration between employers and SDA/training agency staff has shown itself to be a viable way to insure that irrelevant elements are excluded from curricula and necessary elements are present and given the appropriate emphasis.

**Early Feedback**

When employers participate actively in training programs by providing guest lectures or serving as trainers they can assess both training and trainees while the program is still running. With real time feedback, SDAs and training agencies can make "mid-course corrections," rather than learn about problems when trainees can't get jobs at the end of the program.

In the New Bedford Computer Numerical Controlled Machining course, to use one example, feedback from the employer at the mid-point of the program allowed SDA staff to speed up the classroom training segment of the program and change the balance between classroom training and internships. SDA staff, employers, and trainees all agreed that these changes accomplished their objectives and saved a considerable amount of training time.

**Better Match With Job Openings**

Despite advances in data collection and analysis by the Division of Employment Security and employment and training agencies, discerning trends in labor markets remains more of an art than a science. While statistical data are always useful in developing overall training strategies, the Bay State Skills Corporation experience shows that active employer involvement in the design of training programs improves the likelihood that jobs will be present at the close of the training. This approach does not *guarantee* that jobs will be present, but there remains no more accurate source of estimated trends than the willingness of specific employers to participate in the preparation and training of people whom they expect to hire.

**Closer Ties to Employers**

By adopting the private sector partnership approach the SDA and training agency staff will be in close contact with employers throughout the planning and implementation of training. Not only will this yield short-term benefits in the quality of the specific programs, but it provides an opportunity for building longer term relationships that continue after the specific program is completed.

**Enhanced Reputation within the Employer Community**

Publicly funded agencies frequently encounter resistance or indifference from the business community. It seems that public service announcements and media coverage of training graduations do little to reduce employer skepticism about "government bureaucracies" or "welfare chiselers." Most training agencies have the capacity to offer good quality programs, and inviting employers to actively participate in them will ensure that the word gets out. Both the Lawrence and the New Bedford Service Delivery Areas have had new companies approach them to develop customized training programs after seeing the results of the Demonstration programs.

## Impact of Employer Participation on Title IIA Adult Performance Standards

| *Standard* | *Benefit of Direct Employer Participation* |
|---|---|
| **Entered employment rate** | Involvement of employers in planning a curriculum increases the likelihood that the training is responsive to employer needs. |
| | Internships provide direct exposure of clients to employers in work settings, increasing the likelihood that they will hire clients with untraditional background or work histories. The overall entered employment rate of the Demonstration Grant was 73% of all enrollees. Placement of completers was 85%. |
| **Cost per entered employment** | A portion of the total training costs come from sources other than JTPA, thereby lowering the (JTPA) cost per entered employment. The average cost/placement of the Demonstration Grant was $1,800 (exclusive of stipends). |
| **Average wage at placement** | The attractiveness of this approach to primary labor market employers increases the likelihood that clients will be placed in relatively high paying jobs. The average placement wage for the Demonstration Grant was $6.07, 135% of the planned $4.50 level. |
| **Welfare entered employment rate** | Client participation in internships is likely to reduce any stereotypes the employers may have about hiring welfare recipients. Thirty-eight percent of the enrollees in the Demonstration programs were welfare recipients. Their entered employment rate was 69%. |

# Benefits to Employers

The employers who participated in the Demonstration Grant programs have generally been pleased with the opportunity to be involved in the design, operation, and results of training programs. As many of them see it, participating in a training program helps them to screen potential trainees in ways that they could not do themselves. By subsidizing the training, they can improve its content and develop a long term relationship with a reliable source of skilled labor.

Perhaps the best overall indicator of employer satisfaction with the training programs is their desire to participate in similar efforts when hiring needs again arise.

Such willingness has been common in the Demonstration Grant program, as is illustrated by the fact that the Shaughnessy Rehabilitation Hospital and New England Medical Center have both participated in three successive rounds of training. Surprisingly, the financial benefits of reduced costs for recruitment and training of new trainees or the tax benefits of corporate contributions are less significant to employers than the establishment of this long term relationship with a training agency.

Specific instances of the benefits to employers of participating in training activities include:

**Screening Potential Employees**

Even firms with large personnel departments do not usually have the expertise that SDAs have accumulated in sophisticated assessment and testing of potential employees. When employers are actively involved in developing a training program, they have the opportunity to use the SDA's outreach, testing, and counseling expertise to recruit trainees who meet employer-specified criteria.

**Shaping Training**

Employer involvement in the selection of occupations in which to provide training and in the development of training curricula provides an opportunity to utilize public resources to help meet personnel needs within industry.

**Monitoring Training and Providing Feedback**

When employers provide early feedback on the progress of training programs they help themselves as well as the training agencies meet their mutual goals. SDA/training agency efforts provide employers with the opportunity to assess training programs while they are in process.

**Reduced Risks Associated with Training**

Firms with expensive equipment are sometimes unwilling to take the risks of hiring and training unskilled people on the job for fear that they will damage the machines. In several instances, Demonstration Grant programs eliminated this risk by providing program participants with their initial experiences on machinery at the training agency before they were allowed to move on to the more sophisticated equipment at the employer worksite. Employers were more willing to take a chance on someone who did not yet meet their standards for hiring when they knew that person would have sufficient time in training and counseling before they reported to work.

**More Informed Hiring Decisions**

Paid and unpaid internships allow employers to observe potential employees in their own work settings before they make a decision to hire.

**Low Cost Training**

From the employer's point of view, it is the SDA that is subsidizing the training, by providing everything in the program that employers do *not* supply. Instructors, training materials, and equipment are costs which employers would have to bear if they were training new employees without any outside assistance. The costs in these cases are not only financial but include responsibility for hiring, supervising, and conducting in-house training. The intangible savings to industry by becoming involved with publicly funded training can be substantial.

## Benefits to Trainees

It is clearly in the trainee's interests to participate in programs that are well designed and are likely to lead to permanent, full-time employment at decent salaries. As noted earlier in this chapter, active employee involvement contributes to the likelihood that this will occur in many ways.

Statistics compiled by the Bay State Skills Corporation reveal that 85% of the Demonstration Grant program completers and 73% of all enrollees were placed in permanent, full-time employment, with an average wage at placement in excess of $6.07.

**Access to New Jobs**

The Demonstration Grant experience in the New Bedford SDA confirms the conclusions reached in assessments of the Bay State Skills Corporation's overall 50/50 matching grant approach: close involvement between training agencies and employers can result in the capturing of jobs that would otherwise not be available.

Isotronics, Inc. (New Bedford), a high tech manufacturing firm, was having difficulty in meeting the requests of its customers in a timely fashion. Shortages of trained Computer Numerical Control (CNC) machinists prevented the company from adding an extra shift of workers, until the firm met with the New Bedford SDA and worked out a customized training program under the Demonstration Grant Program. Isotronics' contributions far exceeded the cash from the public sector, and as a result of the program, new jobs were created — and filled with JTPA clients.

**Reductions in Welfare Dependency**

Of the 332 JTPA eligible people enrolled in training through the Demonstration Grant public assistance recipients represented about 35% of the total participants. Since the Demonstration Grant Program has experienced higher average wages than many employment and training programs for this target group, it seems reasonable to believe that it has provided trainees with a opportunity to overcome welfare dependency and to achieve economic independence.

*Chapter Five*

# Program Design Options

This chapter contains a discussion of some of the choices that managers in Service Delivery Areas and training agencies must make when they begin to incorporate active employer involvement in their programs. Some of these choices are:

- Determining whether to work with a single employer for each training program or to develop and work with a consortium of employers, and
- Establishing guidelines for the amount and type of private sector participation.

## Creating Consortia of Employers

Most of the Demonstration Grant programs were developed and operated in association with groups of companies, which are usually called "consortia." Some programs involved only two or three firms; others involved more than a dozen employers. In some cases there was a dominant corporate partner with the other companies participating in a less significant way as in the Micrographic Technician Program in Southern Essex County or the Medical Clerical Course offered in Boston. In other cases all the participating companies played an equal role, as in the Bank Tellers Training in Lower Merrimack Valley or the Electro-Mechanical Technicians Training in Hampden County. Each approach has its strengths and weaknesses.

There are many reasons why both training agencies and employers find it useful to involve a consortium of private firms in delivering a training program. From the training agency perspective, this arrangement provides a greater assurance that the program will give trainees a broad range of skills. It becomes more likely that the training will address skills that are useful throughout an industry rather than the specific requirements of a single company, which may not be transferable to other settings.

Working with groups of companies allows training agency staff to learn more about the job structures at different firms, thereby building staff expertise to design similar programs in the future. It also gives training agencies the potential to obtain varied types of employer involvement. Some companies may be more willing to donate supplies or equipment, while others would rather donate the time of key managers. The best way to meet all of the roles spelled out in this manual is to build a consortium of companies with similar manpower needs to participate in the design and delivery of training. These need not all be in the same "industry"—for example, manufacturing, banking, and insurance all need clerical staff with word processing skills or spreadsheet analysis training. The broader the spectrum of private sector partners, the more "recession proof" your training is likely to be. That is, not all industries are affected equally or at the same time by swings in the economy, and your ability to take advantage of this for your enrollees may depend on the diversity of your private sector support.

*Small companies are often willing to have employees participate in classroom panel discussions.*

Small companies, which nationally account for the majority of all employment, may find it difficult to participate in training. Individually, they seldom have the clout to influence the curricula of training programs, nor can they absorb the majority of the graduates of a course. At the same time, most small companies do not have the internal resources, common in large corporations, to train personnel "in-house." This group of employers is dependent on the established education and training system to provide them with new employees with strong skills. Small companies are excellent candidates for participating in a consortium-type training program. Each firm assumes responsibility for only a portion of the support of a program—some can provide lecturers, some supplies, others can accept interns, etc. As partners to the program through a consortium they will have input into its design and content as well as access to a trained pool of job applicants without the expectation that they employ all of the graduates.

Whether you are working with large or small companies, the consortium approach broadens the curriculum and hence the perspectives available to trainees. It increases your opportunities for obtaining employer involvement, and provides a "placement cushion" of a wider range of job opportunities for your graduates at the end of the training. From the employer point of view, participation with a group of other firms frees an individual company from the responsibility of making the total employer contributions. It also offers your partners the opportunity to meet with their counterparts from other firms to discuss issues of common interest. Most importantly, these companies will have the opportunity to establish a long term relationship with a training agency, which will be to your mutual benefit.

Conversely, working with consortia of employers brings with it problems of coordination and conflict resolution that training agencies should be aware of before they encounter them.

To begin with, it takes substantial time and effort to create and coordinate groups of employers. Members of Advisory Committees often have competing demands on their time, and need to be reminded of meetings and encouraged to attend. This activity requires a considerable commitment of training agency staff time, patience, and attention to detail. Many program coordinators complain about the frustration of chasing people to attend meetings that are intended to be for their own benefit.

Moreover, the process of arriving at consensus gets harder with the addition of each new employer. For example, the planning of the curriculum for the Computer Numerical Control (CNC) Machinist program in the South Coastal SDA was complicated by differences of opinion among advisory board members about what skills they were looking for in the trainees. Instructors were hard pressed to come up with a curriculum that was responsive to all of their interests and still meet their own standards of good educational design. The project coordinator felt caught in the middle of two conflicting groups. To solve the dilemma he called a meeting in which the instructors explained their time constraints and the limitations imposed by their equipment and the trainees' backgrounds. The machine shop partners decided that the best way to obtain the skills they needed was to bring the trainees into their shops as interns for several weeks before the end of the training while the instructors could still be available for assistance. It is important for the project coordinator to understand how to obtain consensus from people with divergent interests and needs, or else a consortium can collapse.

On occasion, employers will be concerned about giving away "trade secrets" or violating security standards if they participate in consortium arrangements. Federal defense contractors, in particular, may have to obtain security clearances for every person who sets foot in their plant. Under these circumstances, the project coordinator may find that such companies are unable to provide worthwhile contributions to the program. They can be kept in mind for placement purposes, and may be drawn to participate after seeing the benefits that accrue to their competitors who are participating in partnership training programs.

The BSSC experience with the Demonstration Grant and related programs suggests that the advantages of working with groups of employers generally outweigh the disadvantages. A company's first motivation for participating in a training venture is the possibility of obtaining new, skilled employees, and it is unusual for a single employer to be in a position to hire all of the graduates of a training program. It is even less likely that an employer can accurately project the exact number of trainees it would need to hire upon program completion. In the last analysis, joining a consortium allows small employers such as neighborhood banks, nursing homes, or machine shops their best opportunity to access the local training system.

## Customized Training

There are occasions where the needs of a particular employer are unique or urgent and cannot appropriately be met by participation in a consortium. This may be true when a new industry is moving into an area and needs large numbers of employees, when an influx of new orders is received by an established company and it suddenly needs to expand its workforce, or when a company's product or manufacturing process is so specialized or unusual that generic training programs do not meet their needs. The possibility of offering customized training is a powerful economic development tool to encourage companies to settle or expand in a given region.

The Demonstration Grant worked with two instances of customized training which illustrate both the strengths and weaknesses of the model: New Bedford/Isotronic—CNC Machine Operators; and Lower Merrimack Valley Hillhaven Corporation—Nursing Assistants; and another program which never came to fruition, a Boston-area Health Maintenance Organization (HMO) which needed Clinical Assistants.

Customized training programs prepare enrollees to meet the hiring requirements of a particular employer. From the outset, the company's motivation for involvement is obvious — it is not looking for tax write-offs or a reputation as a good corporate neighbor, it is looking for new personnel. Therefore, there will be no question as to whether the equipment made available for training is state-of-the-art, whether supplies are plentiful, or whether the most knowledgeable personnel are provided to the training effort. The quality of the

contributions to customized training is usually excellent. In New Bedford, the SDA's machine shop had ample metal stock donated to it, there was ready access to the shop foreman for curriculum design and modification, and during the internships the students received both instruction and close supervision on the company's very sophisticated equipment.

Placement is also straightforward in a customized program. If the company has already indicated how many openings it anticipates, and if the SDA has paid attention to that consideration in establishing its class size and entrance criteria, all the completers can anticipate at least one job offer. This relieves a tremendous source of anxiety to trainees, whether or not they accept the offer.

The drawbacks of customized training programs are equally obvious. Training may be so narrow that the trainees may not be qualified to work anywhere but for the sponsoring company. This becomes particularly detrimental if that company encounters an unexpected economic downturn and no longer needs the new employees you have been training for them. On the other hand, the participating company in a customized training program may feel that it has "a right" to all of the trainees. With a seemingly captive market of new employees, they may not feel compelled to offer competitive wages, or they may become upset if any of the trainees decide to seek employment elsewhere.

Another thing to be aware of in developing customized training programs is the impact your trainees will have on existing personnel in entry level jobs at the company. If the graduates of a training program enter the company several rungs up a career ladder and at higher pay than unskilled labor who have been employed there for some time, there is likely to be resentment or even sabotage of the new employees. One way to address this problem is to offer upgrading opportunities to unskilled employees, either through the "10% window" in Title IIA as was done in New Bedford, or through tuition payments from the company.

Customized training can be a dead-end for a training agency. The Boston program to train Clinical Assistants, which never started, illustrates this hazard. The curriculum, which took many hours of staff time to develop, was for a job that existed only at the Health Maintenance Organization that was the partner. This HMO did not want anything included in the course which would prepare trainees for employment at a hospital or a doctor's office, which were their major competitors for skilled employees. As the SDA began its recruitment of trainees, however, the HMO decided it did not like the backgrounds of the candidates referred to them, and withdrew its sponsorship. After the expenditure of much time and money, the SDA was forced to give up the program because it was of no use to any other employers.

In customized training, the curriculum is designed to meet the needs of a single employer, so little capacity is built for an agency's ongoing training efforts. Frequently, the information that is taught is proprietary or not relevant to any other job. Usually, equipment is loaned rather than donated. A tremendous investment of staff time is therefore allocated to meeting a one-time need, and there is little lasting benefit to the training agency from the relationship.

The Bay State Skills Corporation usually prefers not to get involved in customized training. The drawbacks of limited placement opportunity, dependence on the continued economic vitality of a single company and the lack of capacity building for the training agency seem to outweigh the lure of a seemingly guaranteed job at the end of training. Our experience has been that placement is just as good in consortium efforts as it is in customized programs. Nevertheless, there are occasions when customized training makes sense, as in the economic development situation. Access to a skilled labor force is one of the major considerations of a company seeking to expand or relocate. It makes sense to use a Service Delivery Area's resources for training and its access to an unemployed population to meet the company's needs while simultaneously meeting the employment needs of its target groups.

As previously mentioned, the techniques for reaching out to employers will be discussed in Chapters 6 & 7. In the case of customized training, SDA's would do well to be aware of what other city, state, or county initiatives for economic development are being planned. Agency directors and planners have a responsibility to their clients to get to know the players in Industrial Finance, Community Development Block Grants, Urban Development, etc.

Once the relationship has been established between the Service Delivery Area and the training partner, operations staff need to meet frequently to work out the details of design of the training program. It is important to remember that this is not a "senior partner-junior partner" relationship. Each partner brings assets and liabilities, which one hopes will be complementary. The SDA has access to a population in need of training and a job. It has assessment, counseling, and training design expertise. The company has technical expertise and capital resources as well as jobs needing to be filled. The willingness to give and take, to share authority and information in such a situation will ultimately determine the success of the venture.

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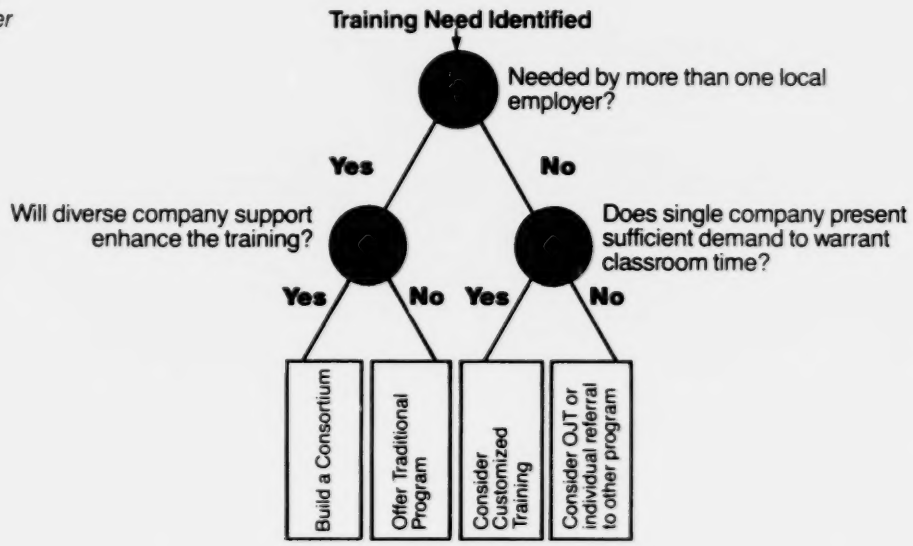
*There are several possible training designs which respond to employer needs.*



# Establishing Guidelines

How can one measure the extent to which employers are involved in a program? How much employer involvement is enough? The operating premise of the Bay State Skills Corporation is that training programs work better and produce better outcomes when employers are sufficiently involved to feel "ownership" in the program. This happens when they have played an important role in developing and implementing the program, and when the training agency has consistently kept company needs in mind as it plans its curriculum, recruitment and placement strategies.

There are no hard and fast rules to assist in the process of putting a dollar value on contributions. How should the donation of a used piece of machinery be valued? What dollar value should be attached to the use of equipment at a company worksite for several hours a day? What does it cost a company to supervise interns?

The Bay State Skills Corporation handles each of these questions individually, each time they come up. BSSC has established a policy requiring training agencies and companies to put dollar values on employer contributions. In building an atmosphere of partnership, the Corporation generally accepts a company's valuation of its donation.

BSSC encourages training agencies to seek both "hard match" such as equipment or cash and "soft match" such as time commitments on the part of companies. Hard match has the clear benefit of reducing the cost of programs, while soft match contributes to the quality of the program by providing input that an SDA, school, or skills center simply does not have at its disposal. Soft match does not usually reduce the cost of the program but it improves its quality and therefore can be even more valuable than cash or other passive forms of participation. Both types are necessary, and both types should be pursued.

It is difficult to measure employer involvement when it is only an abstract term. Therefore, fixed minimum levels of contributions are helpful in motivating training staff to increase the level of employer participation above what it would otherwise be. BSSC has set minimum standards of employer contributions as a condition of the grant award. From the outset, the Corporation has believed that employers and trainers ought to be equal partners in the effort to upgrade the skills of the labor force. As a way to emphasize this point, most training programs funded by BSSC follow the 50/50 match model, i.e., the value of employer contributions is at least equal to the value of the dollar contribution from the grant. This helps to ensure that training is responding to an economic need on the part of industry, not only to the interests of educational institutions or applicants for training.

Other matching models that have been used in Massachusetts include:

The BSSC "80-20" model for programs that serve welfare recipients. The requirement is that the employer contribution be at least equal to 20% of the agency's funding for the training. The lower level of commitment is set to make it easier to obtain the participation of the private sector in programs for target groups.

The Special Institutes for faculty development in which the goal is to open avenues of communication between instructors and industry professionals. In this model, 50% of the time must be spent either on-site at a company or in lectures, demonstrations, etc. delivered by the private sector. The cash value of the time is not as significant as the quality of the interaction.

Adoption of a measurable matching requirement provides a way of translating an intangible level of commitment into something that can be measured and tracked. In other words, it provides an objective that can be put in writing, and which can serve as a benchmark against which program plans and performance can be assessed. Moreover, it demonstrates the seriousness with which the training agency treats the requirement for employer participation and the importance that is attached to the idea of partnership.

The Bay State Skills Corporation believes that requirements for an employer match can be useful in giving companies a reason to carefully document the contributions that they are making to the program. This in turn can produce tangible benefits to the company in terms of lower taxes and intangible benefits such as the "good will" and publicity that a firm receives for being a good corporate citizen. Of greatest value to the corporation is the establishment of a long term relationship with a school or training agency. This is something that a company may not know how to initiate, but once the relationship is established the company becomes vested. Thus, mutual benefits are realized.

## Contributions Can Include

**Personnel Time**

- Curriculum Development
- Administrative Staff
- Instructors
- Guest Lectures
- Internship Supervisors
- Plant Tour Guides
- Advisory Board Members
- Career Planning and Placement

**Donations/Loans**

- Equipment
- Materials
- Supplies
- Facilities

**Cash**

*Chapter Six*

# The Building Blocks of the Employer Involvement Approach

This chapter of the manual has been prepared to help training agencies by providing a list of the ways that employers have been known to assist in the planning and operation of training programs. There is no aspect of a training program that cannot profit from employer involvement. Each of the opportunities for employer participation is discussed separately in this chapter. Wherever possible, examples from the Demonstration Grant are provided to illustrate each type of involvement. Also included are brief analyses of the pros and cons of each type of involvement, and the lessons that have emerged from the Demonstration Grant regarding how to implement them.

As noted in several places in this manual, BSSC's philosophy about active employer participation is based on the belief that quality is the result of shared decision making in every aspect of a training program. There are many opportunities to increase the quantity and quality of this employer involvement in the design, operation, and oversight of training programs which are over and above current ways of planning and implementing them. For example, Service Delivery Areas (SDAs), skills centers, vocational education schools, and community colleges already seek advice from employers in planning programs, and Private Industry Councils meet regularly to approve plans and proposals for funds. These are steps in the right direction when they provide policy directions and advocacy for Service Delivery Area initiatives. However, the experience with the Demonstration Grant and related BSSC programs suggests that more can be done. The employer involvement described in this manual goes beyond these now standard roles to confront training agencies with a challenge: "Are there aspects of your program that can be improved by greater participation of the companies that will ultimately employ your graduates?" Almost always the answer will be yes. The roles that employers can play include:

- determining training occupations;
- developing the curriculum;
- assisting in Outreach, Recruitment and Selection;
- providing instruction;
- donating cash, equipment, materials, or training space;
- providing access to company facilities;
- assisting in job development.

# Determining the Training Occupation

## Description

Organizations that provide skills training use a variety of techniques to analyze trends in local labor market conditions. SDA's combine labor market survey data and personal knowledge of local employers to help decide what training courses should be offered. Based on this rough guidance, it is not unusual for training agencies to continue to offer the same courses year after year until graduates have trouble getting jobs.

Ever since its inception, the Bay State Skills Corporation has used the written commitments of employer's resources to a training effort as the primary basis for selecting an occupation for training. All proposals are required to include letters from companies describing in detail their participation in the training program. Only proposals which can document substantial private sector involvement in the design and delivery of training are considered for funding.

### Pros

When employers participate in selecting training occupations, SDA's and schools receive many important benefits, including:

- Useful insights into local employer perspectives on aggregate labor market trends,
- Access to information about new jobs that result from management reorganizations or technical re-tooling,
- Knowledge of specific job requirements of local employers before developing a formal curriculum.

### Cons

It is difficult to imagine a reason not to involve employers in selecting the occupations for training. The only real question is what weight should be given to this source versus others in the planning process.

## Recommendation

Employer participation in selecting the occupations for training is critical and should be sought. The approach to obtaining employer involvement outlined in this manual is a good way to insure that your training programs are related to real employer needs. The BSSC experience is that employers make substantial contributions to training programs when they feel that there are clear benefits to their companies at the end. Neither employer endorsements of training programs nor other forms of employer participation can guarantee that the companies will have openings to hire program graduates. However, if you *cannot* obtain private sector participation in a training program, then you should consider this as an indicator and weight your program offerings accordingly.

## Implementation Guidelines

As with most things, there are many ways to obtain employer participation in selecting occupations for training. Most SDA planners are familiar with labor market data which identify the occupations that are growing within a state or region and which provide long range growth trends. These measurements are rather coarse: they do not reflect the impact of companies entering or leaving a community, or the impact of technology on the way jobs are performed. This kind of information is only available through personal contacts with employers. Job developers are an excellent resource for this kind of information, because they are aware of where employment demand exists, and what skills companies are trying to find. Planners should seek out information from this source. It can be expanded by surveys or follow-up meetings with employers to obtain their present and projected needs for particular skills and job titles.

Another way to ascertain the private sector's perspective on important labor market needs is to have senior staff join professional organizations and attend their meetings. These can include Chambers of Commerce, local chapters of national groups such as the Training and Development Association or the Design Drafters Association, etc. or local businessmen's associations. (See Making Yourself Known, Chapter Seven for further information.) It is important to become known to the employer community as a potential solution to problems they have attracting and keeping qualified personnel.

# Developing the Training Curriculum

## Description

Participating employers played a wide variety of roles in the development of training curricula for Demonstration Grant programs. At one extreme, the representatives of a firm in the Southern Essex County SDA drafted a micrographics curriculum which was refined by other members of the employer advisory committee and by representatives of the SDA and training agency. At the other, there were several instances in which employers reviewed the curricula developed by the staff of the training agencies and concluded that the skills being taught met their needs.

### Pros

Employer involvement in the design of the training curriculum insures that the training will meet their requirements. Employers know the skills that they need and can easily determine whether or not a given curriculum includes them.

### Cons

Most employers are not educators and do not know what techniques are effective in classroom instruction or how long it should take for a trainee to master a particular skill. Different employers will identify different skills and levels of sophistication for similar jobs, requiring an instructor to provide organization and structure to the disparate views of the partners. This imposes an additional responsibility on already overburdened staff.

## Recommendation

Developing a curriculum with input from both educators, counselors and employers should be your ideal. The employer role is to identify the types of skills needed in a particular occupation and the level of mastery required, rather than to develop a daily or weekly lesson plan. The curriculum validation process, in which employers review a curriculum developed by the training agency, is a useful way to determine whether a proposed course of instruction will satisfy employers needs. Sometimes the curriculum is approved "as is," and sometimes only minor modifications will be requested.

The input of the Employer Advisory Board, for example, informed the United Cerebral Palsy Association that Micrographic Camera Operators also needed to know automated data filing and retrieval systems, and that people who work in those departments are usually physically isolated from the rest of the company and need to be able to function independently. This information, when channeled back to the Assessment Counselors and Instructors helped them modify the curriculum.

Occasionally as was the case with the United Cerebral Palsy Association, you will find an employer who will prepare a draft curriculum. This should be seen as the first step in the process, not the last. Remember that this is a partner relationship, and you both share responsibility for the final product.

## Implementation Guidelines

To develop a curriculum that is both educationally sound and relevant to employer demand, a three step approach makes the most sense. Training agencies:

- obtain statements of the required skills and performance levels from employers,
- develop a draft curriculum, and
- distribute the curriculum to participating employers for review and comment.

This process allows employers to provide the input that you need while giving you the flexibility to decide on such educational issues as the number of hours and the training methods to be associated with each course.

Training agencies should look for three distinct types of information from employers: the subject areas in which training is necessary; the performance levels that trainees must reach in order to be considered for hiring; and any special characteristics or traits that employers look for in potential employees. For instance, employers often stress hiring requirements that pertain to worker attitudes. This information can then be part of the design of an "orientation to the world of work" or similar components of your overall program.

Experience shows that an active employer review of a draft curriculum may require considerable effort. Training agency managers have sometimes found that it is useful to call employers, and provide offers of assistance, to see that the review is done carefully and on schedule. For example, a training agency in the South Coastal SDA held an Advisory Committee meeting to review the draft curriculum. They also sent copies of the draft curriculum to all Advisory Committee members who were unable to attend the meeting and then followed up with personal telephone calls from the training coordinator to the employer representatives.

The end result was that only minor modifications to the draft curriculum were needed. The instructors were able to conclude that they had assembled a relevant program, and the potential employers were drawn into the nuts and bolts of the program from the outset.

# Trainee Outreach, Recruitment and Selection

## Description

The process of putting together a group of trainees is one in which SDA's and training agencies have developed a lot of expertise. The partnership model, however, includes opportunities for employers to assist in these efforts. Employer staff can participate in preparing recruitment notices for local newspapers or allow you to use their company's name and/or logo in the notices. They might make referrals to the training programs from applicants for employment who do not meet their entrance requirements. In some cases the partners may even pay for advertisements that the SDA could not afford.

Companies have Personnel Departments with experience in designing good recruitment ads, and they frequently have good relations with newspaper Help Wanted staff. The support of a large corporation can be invaluable in getting good placement for your advertisements, and in overall good media coverage.

Training programs can also adopt a variety of techniques to involve the private sector in the selection of trainees. Company representatives can participate in applicant interviews conducted by the SDA and/or training agency staff; they can review the "finalists" who have been selected by staff; or they can specify the entrance criteria that they expect you to apply.

### Pros

Training programs may be more attractive to applicants when they are associated with well-known, desirable employers. This can help recruit trainees who are interested in working in an particular environment or for a particular company. Similarly, when employers play a role in selecting the enrollees for a training program, it increases their "stake" in those individuals and the likelihood that they will hire graduates.

When corporate partners help select the trainees, they frequently feel a sense of sponsorship towards them, and will take an interest in their progress throughout the training. At placement time, the trainee will be a known quantity, and will have a much better chance at a good job and a higher salary.

### Cons

You cannot rely exclusively on corporate partners for recruitment, since they do not generally have access to welfare recipients, displaced homemakers or other target populations who are your primary candidates for training. Furthermore, corporations are unfamiliar with the eligibility requirements and service priorities within the JTPA system. Their referrals may flood you with ineligible or inappropriate applicants, to whom you will have to deny access to the training.

It is widely feared that employer input into trainee selection may lead to "creaming," i.e., selection of trainees who are likely to succeed without any outside help. Obviously, companies will be most interested in selecting the best qualified applicants for training, regardless of any considerations of overcoming barriers to employment.

## Recommendation

The use of the employers' names and/or logos in recruitment materials is a very effective way to attract the attention of well-motivated trainees. This approach is worth trying, either through listing all the participating employers or a more limited number of "lead employers."

Taking advantage of employers' personnel departments as referral sources also appears to be a promising idea, bearing in mind that you should explain to them JTPA eligibility requirements in an attempt to reduce the number of inappropriate referrals.

The benefits of including the private sector in trainee selection are long lasting. There is, however, a delicate balance to be achieved. Employers frequently seek attributes that may be missing from a disadvantaged person's background, such as steady work history, high school diploma, appropriate dress and speech, etc. One program coordinator stated the problem this way: "they consider our finished product their starting-off place." Through your recruitment process you must identify a pool of applicants who meet your eligibility guidelines and your priority target groups of those "most in need of service" from whom the private sector can select the final trainees.

## Implementation Guidelines

Recruitment is time consuming and expensive both for employers and for Service Delivery Areas. To the private sector one of the attractive features of becoming involved with training programs is the potential to decrease these costs at the same time they increase their access to different segments of the labor pool. This should be a marketing feature for program developers.

Most personnel departments have a good idea of what it costs them to fill their skilled labor vacancies through newspaper ads and personnel agencies. This frequently amounts to thousands of dollars, so companies have a strong motivation to assist a good training program in filling its classes. Ask your private sector partners to review their recent applicant files for candidates whom they considered "employable" but unskilled. These people can be sent a letter or flyer announcing your program and the eligibility criteria. Encourage employers to refer current job applicants who are in need of training and seem to meet the eligibility requirements.

Some employers are willing to underwrite the cost of ads, to print up brochures, to use their company name in the advertising text. It is in the corporate interest to attract as wide an applicant pool as possible, since they expect to be looking to the graduates of the program for new employees.

You have tremendous resources to offer employers in the assessment of applicants. Intake personnel at Service Delivery Area offices are often skilled interviewers and many SDA Assessment Counselors are capable of administering a battery of interest and aptitude tests in preparation for writing the Employability Development Plan required by the JTPA regulations.

Some corporate partners will choose to be actively involved in trainee selection. The Advisory Committee may decide to review the applications and make recommendations, or may choose to personally interview the finalists. The more input they have at this stage of the program, the more companies are likely to feel that the trainees are valuable new employees they are nurturing.

# Instruction

## Description

Selecting an instructor is one of the most critical elements in delivering a top quality training program. Ideally, trainers not only have the ability to convey technical information, but are also able to develop sufficient rapport with trainees to identify and help them overcome personal problems that may be interfering with the training. The best instructors also have an extensive network of professional colleagues who can participate in the program and assist in placement.

Most of the training agencies in the Demonstration Program selected their own instructors, with varying degrees of employer input and/or concurrence. In Lawrence, the Hillhaven Nursing Home participated in the selection of the trainer by advertising for the position in local newspapers, conducting interviews, and sending their final selection to the SDA for final approval. In the Bank Teller program, one of the Advisory Committee members referred a former employee to the SDA for the instructor's position. In New Bedford, the Isotronics Corporation designated their shop foreman as a co-instructor for the course, responsible for teaching the second half of the curriculum. At South Coastal Career Development Administration the instructors on the vocational school staff were introduced to the Advisory Committee prior to the start of the program. All of these approaches have met with the mutual satisfaction of SDA/training agencies and participating employers.

Representatives of employer personnel departments and/or line supervisors have frequently given guest lectures in training classes. This gives the trainees a reality base about the overall working environment and expectations for particular jobs in industry.

In some cases, employer staff will go beyond that and serve as instructors for all or part of the training. For example, staff from a high tech manufacturing firm in New Bedford provided training on the company's equipment as part of a broader program that also included training provided by an SDA staff member. In Lower Merrimack Valley, staff of a nursing home provided all of the skill training at the worksite, supplemented by tutoring, counseling and basic education provided by the SDA.

### Pros

When the private sector participates in the selection of an instructor there will be:

- a different perspective to supplement the training agency's judgement;
- a strong element of trust from the partners in the quality of the instructor;
- awareness from the instructor of the need to satisfy the employer constituency.

When employers participate in the classroom instruction:

- they bring their knowledge of skill applications directly to the trainees;
- trainees become aware of the personal traits that are important to employers;
- trainees understand that the skills and disciplines being taught are relevant to "the real world."

### Cons

Hiring new instructors is a time-consuming endeavor. By adding companies to the search and screening committees, the process can become even more unwieldy than it ordinarily is.

Many training agencies already have staff instructors for courses which they deliver regularly, so there is not always an opportunity for companies to participate in this way.

## Recommendation

The Demonstration Grant experience suggests that it is worthwhile to ask employers to participate in the process of selecting instructors as well as in the actual classroom presentation. Employer participation in the panel that screens candidates for training positions yields useful insights into their priorities and the characteristics that corporations seek for particular jobs. Instructors with connections to the private sector will have a better understanding of industry standards for timelines and quality, of business applications of skills, and access to guest lecturers, demonstrations, and other forms of private sector participation.

## Implementation Guidelines

Your goal must be to employ instructors who are known and respected by the private sector. If you already employ an instructor, then this person should meet your partners and work with them directly on the curriculum in order to become acquainted. If, on the other hand, you are seeking an instructor, you should inform your private sector partners of this need. Sometimes they will know of someone appropriate for the job and refer a candidate. This was the case in the Bank Teller program where a supervisor who had taken maternity leave was available to teach the course. In other situations, the corporate partners can help you define the job qualifications, read resumes and make interview recommendations, or participate in the entire interview and selection process. Participating companies should be asked to donate either a personnel representative or a supervisor/foreman to the search committee for a new instructor. Members of Advisory Committees become immediately invested in a program when they are asked to participate in this way. It gives them tangible sense of accomplishment to have exercised quality control in staffing a course.

There will also be many opportunities over the course of a program to bring company personnel into the classroom as guest lecturers. The lead instructor, in consultation with the Advisory Committee if there is one, or as part of the private sector curriculum development, should identify the topics that would be appropriate for a corporate trainer to present. Prior to the scheduled presentation, the guest lecturer should be briefed on the scope of the program and how the proposed topic fits in. The regular instructor should be present during the presentation or demonstration to provide continuity and ensure that the trainees understand the material presented.

# Capital Donations

## Description

The private sector match for the Demonstration Grant programs included not only the salaries of corporate staff who participated in the programs but a variety of tangible contributions including cash, equipment and supplies, and classroom space.

In Hampden County, a company donated a broken CNC lathe which gave the students an excellent opportunity to apply the skills they were learning about electro-mechanical repair. In Boston, a hospital donated $50,000 cash which enabled the agency to purchase new microcomputers. In the programs to train Nursing Assistants the partners provided classroom space at their own facilities, as well as the medical supplies and equipment necessary for the training. The New Bedford Computer Numerical Control Machine Operator training program received all of their metal stock for student projects free of charge from the private sector partner.

These examples illustrate the diversity of support that corporate partners make to training programs. This kind of participation can substantially lower the costs of a training program. Capital donations usually leave the SDA/training agency better able to offer additional technical training.

### Pros

Donations of cash, equipment, supplies, and classroom space reduce the total project costs. They can also increase the quality of the programs by including elements that you would not have paid for. Ideally, corporate donations of capital equipment provide the trainees with access to state-of-the-art technology that is otherwise unaffordable.

### Cons

Donations from employers are useful only when they support your overall program. Companies may provide inappropriate personnel or space, or donate outdated equipment unless you clearly demonstrate how it is in their best interest to do otherwise.

## Recommendation

Employer contributions of cash, equipment, and/or facilities represent tangible expressions of employer commitment to training programs, as well as means of lowering the cost or improving the quality of training. Therefore, they should be pursued, as long as care is taken to ensure that the donations are elements of a broader employer involvement strategy. Keep in mind that one of the goals is to build the capacity of the training agency to deliver well trained employees to the private sector. Capital donations should not be a substitute for the personal involvement of the private sector.

## Implementation Guidelines

When seeking major corporate donations, take time to design an approach that emphasizes the benefits that will accrue to both the training agency and the company. Some project coordinators reported feeling embarrassed when they spoke to companies because they did not already have all the resources to conduct a program. Companies have a vested interest in helping schools provide technologically up-to-date training, so there is no need to be embarrassed by asking them to help.

Part of your strategy must be your recognition that you are helping the company solve a problem or meet a major need. For example, equipment manufacturers make donations or substantial discounts to training programs as part of a sales strategy—the availability of people trained on *their* brand may help a salesman clinch a deal—and trainees will be predisposed towards a particular brand when they go to work. From an equipment user's point of view, providing a training agency with state-of-the-art technology increases the potential skilled labor pool and decreases the cost of on-the-job training for new employees. Thinking of these benefits to companies must be a major part of your preparation.

There are several ways that companies can be approached for capital donations. Most large businesses have a corporate contributions policy that requires you to write a grant application. If at all possible, talk to people at the company first to find out what they look for in a proposal—how many people will benefit from the donation, the opportunity to explore different applica tions for their product, tax benefits, good community relationships, etc. Their review process is probably not unlike your own.

Corporate contributions are not the only avenue through which companies make donations. Sales departments give substantial discounts, manufacturing departments provide after-hours access, or used equipment when they purchase something new. The marketing piece for a training agency is to outline for the company how their assistance to the training ultimately benefits them.

# Providing Access to Company Facilities

## Description

A number of the companies that participated in the Demonstration Grant provided trainees with access to their facilities through tours, job shadowing, and internships. Several hospitals and banks in various programs offered tours in which trainees observed the overall functioning of a corporation, and had an opportunity to learn how different departments are interdependent. By visiting several companies they had the opportunity to compare different corporate styles. Later in a program trainees could reinforce their skills and begin to orient themselves to the working environment by participating in an internship. In internships, trainees are assigned to employer worksites under the supervision of the staff of the participating firms. They are expected to learn the responsibilities of regular employees as they attempt to apply the skills they have been taught in the classroom.

The New Bedford SDA developed a program that included paid internships at a high tech manufacturing plant which made an up-front hiring commitment, according to the traditional requirements of on-the-job training (OJT).

The internships in Boston hospitals for Unit Clerks were quite different. These were unpaid and occurred after the classroom training was completed. This kind of training component is more properly called an internship.

Training curricula that combines classroom training and internships can combine the strengths of both: settings that are appropriate for basic education and the introduction of basic skills followed by one that provides state-of-the-art equipment and exposes trainees to the expectations and requirements of supervisors and co-workers.

### Pros

Tours and job shadowing provide trainees with a better understanding of the work environment than can be conveyed through classroom training alone, even when it is supplemented by guest lectures, slide shows, and similar techniques. Trainees will be in a better position to make informed choices about job offers as a result of these visits.

From an employer perspective, tours and job shadowing provide an opportunity to become acquainted with the trainees in an informal setting.

Internships expose trainees to the work environment and the expectations of employers at the same time that employers are learning more about the men and women who will be applying for jobs at the end of the training program. An internship often allows trainees to:

- obtain experience with more up-to-date equipment than may be available at the training site;
- learn about employer standards of punctuality and worksite behavior;
- and can deal with some of their anxiety about entering the work force in a comparatively non-threatening setting.

Paid internships and OJT also provide a means of overcoming the JTPA limitations on paying training stipends or allowances. Incorporating this component into the curriculum means that clients do not have to forego all income while they are in training.

### Cons

Teachers sometimes view field trips as an interruption of valuable classroom instruction time instead of as part of the training. Consequently, they may not integrate the experience gained in these trips into the curriculum.

Some companies perceive tours as a public relations effort, and do not provide the trainees with any exposure to the real work that goes on.

In companies with federal contracts, security precautions may prevent them from allowing trainees on site.

Internships can be frustrating for both trainees and employers if they are not properly designed. Interns may be treated either like free labor with no opportunity to learn, or conversely not have any real function at the company.

The decision to pay interns also brings with it certain risks. In particular, company managers may view the OJT requirement to "hire first" and to pay at least half of the salary of those who complete classroom training programs as a disincentive to providing additional training to the intern. Once the trainee is on the company payroll, the employer's primary interest may be productivity, so that opportunities to learn a new procedure may be limited.

Programs that combine classroom training with internships/OJT require a high level of training agency staff time to insure that appropriate coordination takes place between the activities in the classroom and in the internship.

## Recommendation

The qualitative benefits of providing trainees with access to company facilities are so great that training agencies should integrate tours and/or job shadowing into curricula wherever it seems feasible.

The Demonstration Grant has also shown that well designed and executed internships are useful "trial marriages" between trainee and employer. Each can size up the other before any hiring decisions are made. This experience has helped trainees to get a chance and employers to avoid costly hiring mistakes.

## Implementation Guidelines

The classroom instruction portion of a training program, no matter how good the quality, is always a little abstract and theoretical. The transition from school to work may require a period of learning shortcuts and useful alternatives to procedures taught in the classroom. Many learners are confused by this and need time to make mistakes without fear of losing their jobs. Having a counselor or instructor accessible to explain the discrepancies between what they learned in the classroom and how it is being applied on the job improves the trainee's performance and alleviates much anxiety and confusion in their transition to full time work.

When the curriculum is being developed, the instructor and project coordinator should set aside some time for the entire class to visit the worksites of several of the participating companies. It is important for the instructor to be committed to this activity from the outset. Otherwise it will be relegated to the status of an "extra frill" and there will never seem to be time to get around to it. The project coordinator and instructor need to discuss what they expect

the trainees to learn from a tour and how the experience will be integrated into the overall curriculum. It should then be the responsibility of the project coordinator to call upon the corporate partner and schedule the tours. One of the biggest problems that can be encountered in partnership training programs is the disorganization that results from having too many people pulling in too many different directions. The corporate partners will find it far less confusing if there is a single spokesperson from the training agency with whom they deal.

When making appointments for tours, the coordinator should explain the purpose of the visit. If there is a particular department or piece of equipment that will be most relevant to the training at that time, let the company know. Otherwise you may wind up with a public relations tour, which will be interesting but not necessarily of benefit to the training. Try to get the company to schedule time for the trainees to have a roundtable discussion with employees in jobs similar to the ones they are training for, and also to speak to the Personnel Department about entry requirements, hours of work, and whatever else may be stimulating the trainees' curiosity. The typical tour lasts from two to four hours, and usually generates a great deal of enthusiasm on the part of both the trainees and the companies they visit.

Some companies may be reluctant to have groups of twenty or more people descend upon them at one time. The coordinator needs to raise this issue when scheduling the tour, and should offer to divide the group into sections. Another approach that works well for small companies or those that are reluctant to have a large group of trainees make a tour is to schedule individual trainees for job-shadowing. This works best one-on-one, and may last for a whole day or only for a few hours. The purpose is to help the trainee understand the variety of tasks involved in a particular job; the pace and stress associated with it; and how it fits into a department's overall work. Job shadowing experiences do not usually involve any hands-on work on the part of the trainee, so they may be scheduled at any phase of the program. However, because they are so individualized they can create a scheduling nightmare for the project coordinator and instructor and are generally not as desirable as tours.

In building an internship component into a training program, the instructor should have a clear idea of what skills should be mastered during the on-the-job phase. The instructor or project coordinator should become familiar with each of the internship sites and learn the particular job requirements from each company supervisor. At this juncture, good communications are essential. Internship supervisors should be reminded that the interns are still in training, and you should discuss with them the range of responsibilities the intern will have; the company's expectations for performance; and the amount of supervision available, etc. You might find it useful to draft an "internship agreement" covering these issues. A word of caution, though. While the internships should be organized and well thought out, remember that the SDA and the participating company are equal partners in this venture. SDAs have been known to become over-zealous in the protection of trainees through monitoring or applying "corrective action" when companies assign trainees to unpopular hours, etc. The private sector will ultimately be employing the trainee, and their policies and procedures must be respected. Issues of this nature should be negotiated up front and explained to all staff involved with a program. SDAs should remember that their ultimate goal is to establish a relationship between a trainee and an employer, without SDA involvement.

Conversely, trainees should not be abandoned once they begin their internships. The instructor, program coordinator, counselor or other representative of the SDA or training agency should make personal contact with the trainee and internship supervisor at least once a week to ensure that learning is taking place, that the trainee's attendance and work attitude are good, and to intercede before any problems escalate out of control.

Some programs have found it useful to bring all the trainees together for a half day a week during their internships. This time can be used for additional classroom instruction/brush-up; for group counseling; and for job search activities such as resume writing, interview skills, etc.

There are many ways to arrange internship sites. There are examples of several different approaches in the Demonstration Programs. Sometimes large companies can handle an entire class, and sometimes trainees are distributed among a number of worksites. It is obviously easier for the training agency if there is only one company to deal with, but this may unnecessarily limit trainee options.

Usually the program coordinator recruits the internship site and negotiates an agreement well in advance of the beginning of the actual internship. In Berkshire County, however, the trainees were responsible for finding their own internship sites. This was not a particularly successful technique and resulted in internships of widely varying quality. The intention was to encourage trainee initiative and to give them practice in job search skills, but the vital connection between training agency and company, instructor and supervisor, was never forged. Other programs, notably the Bank Tellers in Lower Merrimack Valley and the Electro-Mechanical Technicians in Hampden County, achieved the same goal of practicing job search skills by having the trainees apply for internships with the participating companies and go through an interview process. This worked well for them, but the poorer students had limited choice while the better students were much sought after. Other programs, to avoid this, simply assigned students to internship sites based on the instructor's estimate of the best match between the trainee's aptitude and the "corporate culture" of the company. Another approach was to allow the students to rank their choices of internship sites and to ask the Advisory Board to review the student records and make recommendations.

The particular approach adopted for any program will be an outgrowth of the relationship built between the SDA/training agency and the corporate partners. It will depend on the amount of time the private sector is willing to donate to the process and the amount of control the public sector is willing to share.

A final caution: sometimes companies which with good intentions agree to accept interns, are unable to fulfill their commitments. When planning an internship component, try to develop more slots than you need, or understand that you may have to do some last minute outreach to the private sector. Obviously, it is a good idea to maintain contact with your planned internship sites throughout the classroom component of the training to avoid any unpleasant surprises the day before the internships are scheduled to begin.

# Assisting in Job Development and Placement

## Description

The employers that participated in Demonstration Grant programs assisted in job development and placement of trainees in many ways. They offered career orientation lectures to help trainees decide which specific jobs to pursue, they conducted mock interviews to give trainees practice and feedback on how they were conducting themselves, and, of course, they interviewed program completers and hired those that seemed the most likely to meet their needs.

Employer participation in the Demonstration Grant programs was not restricted to companies that were sure they would be hiring at the end of the training cycles. Even companies without an immediate need for new employees offered world of work workshops in which they described the nature of their industry and the qualities they seek in new employees.

### Pros

When corporate personnel representatives role-play job interviews, trainees seem to take the situation more seriously than when the same thing is offered by a job counselor. The presence of company representatives in the classroom gives the trainees an opportunity to ask questions about the nature of jobs they are training for, the chances of them being hired, what people like and don't like about their work, and any number of other concerns students may have. Employers gain an opportunity to meet a group of people who may be interested in working for them, and to do some marketing of their company. This is a good way to increase the exposure of your training program to companies which may not have been able to participate in the technical portion of the training.

Active efforts to involve employers in job development and placement will usually be rewarded by better placement rates. Beyond this, your efforts to work with employers in these activities will be rewarded with the best available feedback as to the success of the program in meeting its training objectives.

### Cons

Firms that are not in a position to hire program graduates may not wish to raise false hopes among the trainees by participating in practice interviews, resume review, etc. Sometimes trainees assume that the participation of companies in this portion of the program is tantamount to a guaranteed job, and they need to be counseled that this is not necessarily the case.

## Recommendation

Asking employers to commit themselves to interview and seriously consider hiring program graduates is a good way to introduce your program to new companies. The time commitment is minor, but the potential benefits to both you and the company may be enormous.

## Implementation Guidelines

If the Advisory Board or other corporate partners have been brought into the decision-making process throughout the program, their sense of ownership towards it will again pay off at the job development phase. Those partners with positions available will undoubtedly be calling the coordinator or instructor to get referrals. Those partners without any current openings can be called upon to participate in other ways. Sometimes these companies are embarrassed if they cannot offer a job to any of the trainees, and they may be tempted to withdraw from the program. Keeping in mind that in the future they may have jobs available, the project coordinator should take pains to reassure such a partner that their participation is still valuable. These companies can assist in the job seeking skills training of the students, or they may be aware of openings at other companies to which they can refer the trainees.

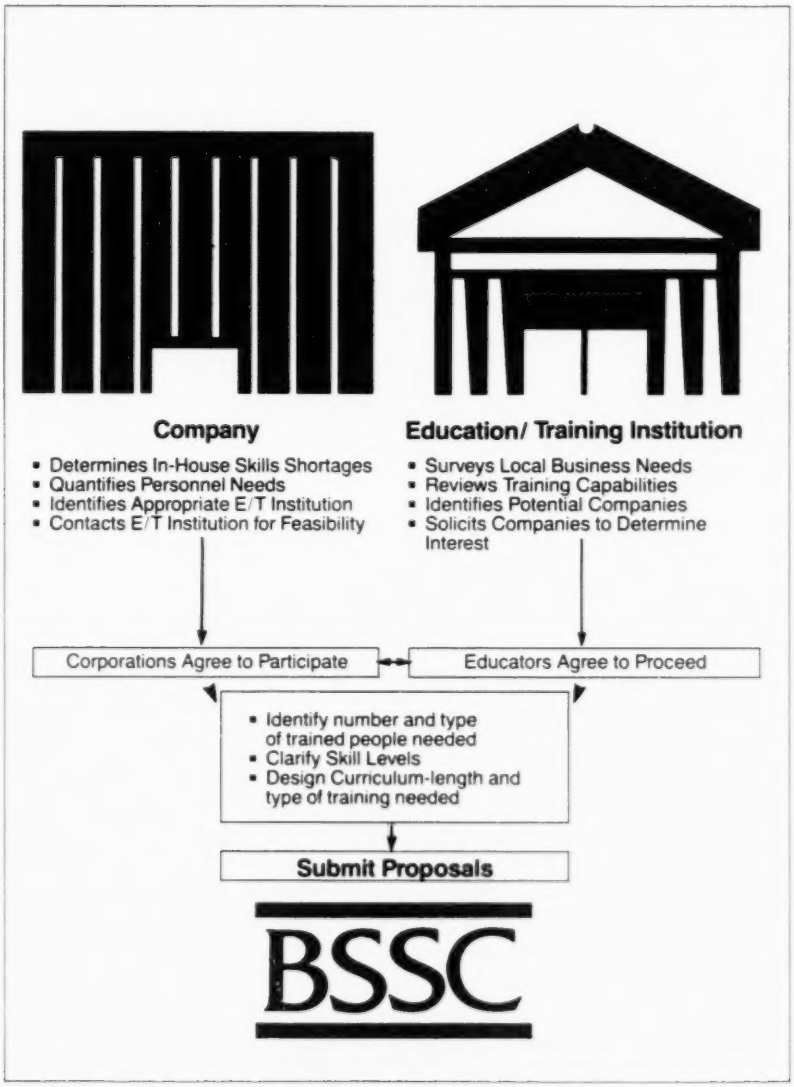
Participating employers are often a valuable source of information about other firms that may be interested in hiring successful program graduates. Staff can then invite companies that are identified as potential sources of employment to actively participate during the program. It is good exposure for a company to address a group of trainees on the nature of their industry; what they look for in a new employee; what the opportunities for advancement are; and what makes their company special. Whatever the form of participation, the project coordinator will do well to continue to work with the private sector as partners in this venture. There is a larger goal than finding jobs for one group of trainees, and that is the building of a long term relationship that will benefit future groups of enrollees as much as it does this one.

# Making It Happen

It is one thing to talk about employer involvement in training, and another to make it happen. This chapter of the manual has been prepared to provide practical "nuts and bolts" guidance to SDAs and other training organizations in their efforts to adopt the approaches and organizational relationships outlined in previous chapters.

The chapter provides a developmental approach to making it happen. It starts with a discussion of the steps that can be taken to lay the groundwork for developing relationships with employers; then there is a discussion of getting started; and finally there is a discussion of ways to maintain and build upon existing employer involvement.

## Program Development


Company
• Determines In-House Skills Shortages
• Quantifies Personnel Needs
• Identifies Appropriate E/T Institution
• Contacts E/T Institution for Feasibility
Education/ Training Institution
• Surveys Local Business Needs
• Reviews Training Capabilities
• Identifies Potential Companies
• Solicits Companies to Determine Interest
Corporations Agree to Participate
Educators Agree to Proceed
• Identify number and type of trained people needed
• Clarify Skill Levels
• Design Curriculum-length and type of training needed
Submit Proposals
BSSC

# Laying the Groundwork

Efforts to increase the involvement of the private sector in training programs rarely develop in a vacuum. The staff of most training programs have already developed some relationships with employers, if only to place clients in jobs.

Obtaining employer involvement is easier if you are already known to the business community and are familiar with both its key personalities and economic trends. Your efforts to develop programs using the models outlined in this manual will be simplified if you make it your business to get to know the personnel officers, engineers, presidents, etc. in the companies that do business in your area. It will be easier to gain entry when you are an active member of the local business community as well as of the human services community.

## Making Yourself Known

Training agency staff should always be on the lookout for opportunities to get to know potential business partners. One way to build such ties is through participation in business and professional organizations. Most people are surprised to learn of the number of different business-related organizations active in their communities. Regional organizations such as the Chamber of Commerce and Kiwanis are well known, but there are dozens of industry groups or professional organizations, such as the American Production and Inventory Control Society, the Institute of Electrical and Electronic Engineers, Inc., the North American Society of Training and Instructional Design, the Council of Professional Women, the Society of Black Engineers, and so forth, which have local or regional chapters all over the country. If you are not already aware of the existence of such organizations in your area, consult some of the nationally published Directories of Associations which are available at your public or local university library.

These business organizations are frequently looking for interesting guest speakers for their meetings and would welcome the opportunity to learn about the Job Training Partnership Act and what it can do for them. Surprisingly enough to people in the employment and training world, much of the business world has never heard of JTPA, BSSC or other similar organizations.

Once you have found some of these groups there are many ways to be involved with them. This includes activities such as submitting articles to their newsletters, surveying members on topics of mutual interest, using their mailing lists, distributing materials at meetings, and co-sponsoring symposia or events.

Active participation in business organizations, including committee work, can be considerably more time consuming than simply attending periodic luncheons or breakfasts. However, you will probably find that active participation is especially likely to generate leads for training programs with extensive employer involvement. It is important to get the word out to the business community that you exist — and doing so can be the first step to developing long term linkages with the private sector.

Getting to know the business men and women with whom you will be dealing is the best way to begin to design training programs with extensive private sector participation.

## Formal Relationships

Every Service Delivery Area has a formally established connection to employers in its Private Industry Council. Training agencies and vocational schools also frequently have Craft Advisory Boards. These boards are not always used to optimum advantage: sometimes SDA staff view their PIC as tangential to the real business at hand; many PICs are used only to ratify plans that the staff have developed; others provide policy directions and service priorities, as would a Board of Directors. These are valuable roles for PIC's to play, but they fall short of the active "hands on" participation of employers that is the BSSC model.

Before you begin your outreach to employers, it would be worthwhile to meet with individual members of your PIC or advisory board. They already have ties to the employment and training community, and may be ready for more prominent roles in delivering training programs as described in this manual. They should also be asked to provide referrals to their colleagues who might participate in a training program. Those who are identified in this manner should also be asked recommendations, thereby creating an ever-growing network of potential private sector partners.

## Informal Relationships

Many times, staff at the Bay State Skills Corporation have been asked "How do I get started?" Joining business groups and working with your PIC are good ways to make a connection with the private sector, but do not overlook personal connections — friends or acquaintances, successful graduates of previous training programs, or other people you do not ordinarily think of in a business setting. These informal relationships can also become springboards to increasing employer participation in your training programs.

For example, some of the program advisory board members for the South Coastal SDA were recruited by one of the course instructors, from among his acquaintances at a health club. Another SDA invited all its job developers to a meeting with the program developer who asked them to identify where successful graduates were working. Any existing relationship can provide a useful foundation upon which to build a training partnership.

There are other sources to consider when you are trying to think of ways to reach out to the private sector.

These include:

- Economic development and related government agencies: Companies considering expanding or moving to an area often contact Industrial Bond or Community Development agencies in order to explore tax advantages and other government programs. A good economic development agency could be an excellent source of information about projected hiring and training needs. You should work at becoming part of the local economic development package;
- Satisfied customers: Employers with whom you have worked in the past may suggest others who could benefit from similar programs;

- Newspapers and other local media: Stories about plans for new plants and/or the expansion of existing ones fall into the same category as economic development leads;
- Help Wanted ads: When these show up week after week for the same occupation, there is probably a mismatch between labor supply and demand that you could help rectify;
- Serendipity and word-of-mouth: You may drive past a field that has a sign saying a factory will be built there in the next year; a real estate agent may know about top executives who are trying to buy houses in the area. You need to "keep your ears to the ground," and be open minded and inquisitive.

## Learning about the Needs of Business

Business people will be more receptive to employment and training programs when they believe that you can solve a problem for them. People that you have met at business or industrial associations may think of you if their company is looking for a service that you can provide, but your knowledge about a specific company, its employment needs, products, and recent track record will be necessary before you can begin to discuss the possibility of developing a program. The Help Wanted and Business sections of the newspaper can provide clues about local activities, and should be part of your daily routine.

## Timing

When the outreach to business originates with you, it is more likely to be successful if it is timed to meet the needs of companies, not the needs of SDAs or training agencies. Nevertheless, SDAs, school systems, and other publicly funded groups generally face rigid planning cycles. One solution to this timing dilemma is to set funds aside for training programs with employer participation, but to obligate them on a rolling basis over the course of the year, as employer needs arise. The Bay State Skills Corporation issues its Request For Proposals for 50/50 Matching Grants four times a year. SDAs could adopt a similar system, or could even provide an ongoing process of making businesses and training agencies aware of the availability of funds, with proposal submittal at any time.

# Staffing the Effort—
# Consultants vs. In-House Staff

At the beginning of the Demonstration Grant, many of the Massachusetts Service Delivery Area Directors wanted to develop partnership training programs, but they felt that their staff was too busy managing all the formula and discretionary JTPA programs available to them. Directors could not imagine having the time to reach out to the employer community, using "cold calling" sales techniques or attending meetings of trade or industry groups to solicit their participation in training programs. To help those SDA get started, the Bay State Skills Corporation offered small development grants. Any SDA that was interested could use these funds to hire a consultant of their own choice who would call upon employers, explain the services available to them through JTPA, identify any manpower needs the company had, and seek the participation of companies in training programs.

Five of the fifteen Massachusetts SDAs took advantage of these development grants, and four actually developed programs through them. Of the remaining ten SDAs, five attempted to develop programs using their own staff, and four were successful. Thus, consultants were no more likely to develop training partnerships than were regular SDA staff. However, of the programs developed by the consultants, two never got off the ground, and several required extensive monitoring and technical assistance in order to make them successful. The programs developed by in-house staff were much smoother in their implementation.

## The Use of Consultants

Consultants are generally considered to be people with expert knowledge who can devote their complete attention to a special project. The immediate and obvious benefit of hiring a consultant to do program development is having an extra pair of hands to assign to the project. Outreach to employers is very time consuming, particularly when the project starts with the attempt to identify the local labor market needs. The consultant can devote 100% of his or her time to planning the outreach strategy, calling employers, and following up the contact, with none of the internal operational distractions that are the responsibilities of Planners, Training Managers or other administrators.

Sometimes SDA or PIC directors may feel that their staff do not have enough "polish" to approach the private sector. In hiring a consultant they have access to skills not available in existing staff at the same time that they present a professional image to companies.

In light of all of this, the drawbacks to using consultants for program development may be unexpected. Most SDAs discover that they must spend a great deal of time orienting the consultant to the services offered by the agency and/or school system. It is also necessary to closely supervise the workload and output of the consultant in order to make sure that the information obtained is useful to the SDA. Consequently, the anticipated time savings of employing a consultant will be not realized in most cases.

In cases where the consultants succeed in obtaining private sector commitments for programs, there may be difficulties with staff taking "ownership" of the program after it is developed. Training or Operations Managers may feel that the consultant is making extra work for them. Unless they have been involved from the start, they will be in the position of inheriting someone else's work and not understanding how it has evolved. Program design may not necessarily fit smoothly into the ongoing operations of the SDA. Certain skills may have been assumed to be available in the client pool which are not

there; feeder programs may have been called upon before they are ready; and negotiations with employers may have involved promises which the SDA is not able to honor. In short, the consultant can not know the SDA delivery system well enough to be responsible for developing a well-integrated program, yet the private sector will know and to trust the consultant. Since no relationship with SDA staff has been established, the company and the SDA will have to start all over to learn how to work together.

In the opinion of the Bay State Skills Corporation, SDAs are better off using their current personnel to develop private sector partnerships. Consultants can be useful to train staff on sales techniques, public speaking or any skills the Director feels are necessary before outreach to companies begins, but SDA staff are in the best position to know what is "do-able" within their system: when to schedule programs; what kinds of applicants they can recruit; the availability of instructors, classrooms, equipment, etc. for a particular training program; and the philosophy of the agency.

Furthermore, the use of consultants to develop new programs does nothing to build the capacity of in-house staff to include the private sector in their thinking. At the very least, an in-house representative should work with the consultant during the implementation phase to ensure a smooth transition process. Otherwise, once the consultant is gone, the SDA is in no better position to develop partnerships than before because the technique has not been incorporated into the way the agency does business. The use of consultants for program development, in the opinion of BSSC, brings no special benefits to a Service Delivery Area.

## In-house Staff

There are a number of steps that you can take in identifying which staff are the most appropriate to recruit companies for active participation in training programs. It is not uncommon for agencies to feel that their staff is already so overextended that they could not possibly add business outreach to their jobs. All too frequently, there are untapped resources within training agencies, people who simply haven't been asked to help, despite their knowledge about employers.

Start with staff who are already in contact with employers. One approach that was used successfully by the New Bedford SDA involved using the same staff who were already responsible for regular employer contact, the people who develop On-the-Job Training contracts. When the SDA wanted to find out which employers were most appropriate for a partnership training program, they turned to these "Account Executives" who, in turn, were able to introduce the program developer to their contacts at a number of firms, and to brief him on their experiences working with these companies.

Other SDAs and training agencies have adopted an inclusive approach, calling upon the resources of anyone in the organization who might have ties to local employers: administrators; instructors with colleagues in industry; former trainees who have been promoted into managerial positions; job developers aware of firms that might be interested in customized training; or specialists in assessment and counseling who belong to professional organizations that bring them into contact with Personnel Officers in industry.

According to the Director of the Lower Merrimack Valley SDA, all his staff are viewed as potential resources for contacts with the business community. Ideas and contacts are solicited from each of them. This approach to developing employer contacts has resulted in some of the most successful partnerships among the Demonstration Grant programs: the Bank Teller and the Nursing Assistant programs.

## Generalist/Specialist Approach

Who should be the first person to talk to a potential training partner? Is it better to approach a company with a generalist in employment and training or with someone who is knowledgeable about the technical skills? Organizations which have developed partnerships with the private sector have used a variety of techniques with varying degrees of success, but you might consider employing a two stage process: initial contacts by an Employment and Training generalist, and then subsequent contacts in which the generalist is accompanied by a specialist familiar with the technical skills needed by the employer.

It is important to be well-coordinated when the time comes to actually conduct your private sector outreach. The Employment and Training generalist should be a manager with sufficient authority to make commitments for your agency in the initial marketing call. This is usually the Director, Planner, Operations Manager, or similar person who understands the overall function of the agency. This person must be both articulate and a good listener. If a company seems interested, the generalist can mobilize additional resources from either inside the training organization or elsewhere. Subsequent visits which include the technical specialist who understands the subject matter of the training will address the details of the project design and the appropriate forms of participation from the company.

*Choose an employee who is knowledgeable about your agency for company outreach.*

# Approaching Employers

Tailor your approach to the specific employer. Firms differ greatly in size and needs, so you must be flexible about the types of services and partnerships that you offer in order to meet these varying needs. For example, if a company has a sizable hiring need for computer numerical control machinists, you might ask them to provide access to the equipment after business hours for training. If the firm is small, then you could invite it to join a consortium of employers to develop curriculum or provide guest lecturers. Companies that are updating their computer systems can be asked to donate the system they are removing.

The questions that you could ask about how best to make the first contact with employers are virtually endless. Should you visit an employer and follow up with a letter, or should you send the letter first and ask for an appointment?

Do you need a brochure or promotional literature? Should you start with the chief executive officer of the firm, or with the personnel department? Should you try to deal directly with the staff who have line responsibility for production?

The best way to get started is whatever feels most comfortable to you. Experienced program developers differ among themselves about the best approach because there is no single best way to approach employers.

## Who Do You Talk To?

There are two basic strategies for getting your foot in the door: bottom up and top-down. Office managers or shop supervisors may be more accessible than higher ranking officers, and they probably understand their skills training needs better, but they are generally not in a position to commit their companies to any new ventures. Consequently, their desire to participate on an advisory committee or otherwise contribute to a training program must make its way up corporate hierarchies, which can result in long delays, and possibly end in their inability to obtain approval for the proposed commitments.

There are many advantages to making your initial contacts with high-ranking corporate officials. If you have obtained the approval and enthusiasm of a chief executive officer, it will be easier for the staff person assigned to the advisory committee to get away from work to attend meetings, to recquisition supplies that might be donated to the program, or to request other company staff to serve as guest lecturers, supervisors of interns, and so forth.

## Case Example

The following case history illustrates several effective strategies for gaining access to the private sector to obtain corporate contributions for training. The speaker is the Project Coordinator of the Micrographic Camera Operator program operated by the United Cerebral Palsy Association, a private non-profit corporation operating under sub-contract to the Southern Essex County SDA:

> *• After identifying the training occupation, we used our Board of Directors to get ideas and contacts in the business community. We also went to the local PIC and used their contacts. We got a sense of the demand for positions during these early calls with employers.*
>
> *• Our approach to marketing called for visiting companies with brief written statements of the goals of the project and of its curriculum. In return, we asked the companies a lot of technical questions pertaining to productivity levels, the kinds of training that were needed for this occupation, and so forth.*
>
> *• One approach that seems to work is going to the top of major corporations. For example, the Bell and Howell national office gave us a contact in Needham, which became a major source of equipment for the project.*
>
> *• We also contacted legislators' offices because they know who to call in a community. At conventions of microfilmers, we went from booth to booth to learn about the equipment or the possibility of donating staff for training. Conventions are full of salesmen who can also give you the names of contacts at other firms.*
>
> *• As a result of our outreach, a total of fifteen companies have donated equipment, internships, or staff for training. They have also come over to see our trainees to assess the extent to which the training is preparing them for jobs with their firms.*
>
> *• We have found that the best way to get companies' attention is to have a brief, professional-looking packet of materials that includes a glossy brochure of who we are, a fact sheet about the specific project, and a wish list of things that we would like the companies to donate.*
>
> *• We think the package is most effective when it follows an introductory telephone call. It will go into the wastebasket if it comes before the introductory call.*
>
> *At the end of the meeting, we always ask, "Who else do you know that we could speak with?"*

## Selling a Product

Your efforts to obtain company involvement will be most successful when they appeal to the enlightened self-interest of the employer. The Demonstration Grant and related BSSC programs have shown that the most successful efforts to obtain employer participation in training programs were based on a sales approach that identified a specific problem being faced by an employer and then spelled out precisely how the SDA or training agency could help solve the problem.

Your approach must make it clear to the company exactly what's in it for them. The benefits may include:

- lowered costs of recruiting new employees;
- shorter break-in training for new personnel;
- higher productivity from a better trained workforce;
- an opportunity for managers or professionals to get to know and work with colleagues at other companies;
- an opportunity for professional growth on the part of the participating company staff; and,
- an opportunity for the company to establish a long term relationship with a source of skilled labor.

## Do You Need Brochures?

Some program developers have concluded that an attractive, professional looking brochure enhances their credibility with employers. Others feel that such brochures represent an unnecessarily expensive use of scarce funds.

The Demonstration Grant and related BSSC experience suggest that such brochures can be helpful, but are by no means necessary. They are probably of less importance than the other items that are discussed in this chapter such as finding the right people to talk to and selling a product that helps employers to overcome a problem.

## Arrange Face-to-Face Meetings Wherever Possible

Face-to-face meetings are the most effective way to make an impression. But how do you get your foot in the door? The best way is probably to pick up the telephone and ask for an appointment. If you have a connection, such as those described earlier, this is the time to use it—"so-and-so mentioned I should call you" or "so many of our graduates have gone to work for you that I wanted to discuss a project that you might be interested in." The hard part is getting started. Once you make up your mind to make the call, it's no different from any other meeting you try to arrange.

At the conclusion of your introductory meeting, ask the person with whom you have been talking to refer you to the person within the company who might best serve on a committee or otherwise participate in the training program. Then, when you talk to the candidates for membership on the committee, they will already have the blessings of management.

## Be Specific

In many cases, employers who are contacted by an SDA or other training agency staff are not sure about what JTPA is, or what you have to offer. They are unlikely to know just what you have in mind when you ask for participation on an advisory committee. They surely won't know what will be useful to your project unless you clearly explain what you are seeking. Going in and just asking for "whatever help you can give" is a pretty sure way to get "No" for an answer.

Therefore, when you talk to employers take special pains to be specific. Spell out what you are offering (e.g., a better trained employee) and what you are seeking in return (e.g., loaned training equipment, paid or unpaid internship positions). Many first time program developers have commented about how surprised they are to find employers agreeing so readily to participate in a program when they have been asked for a specific contribution.

## Maintain Flexibility about Employer Contributions

Some employers can afford to make a cash contribution to a training program and others can't. Some have equipment that might be used on-site during off hours and others have equipment that they may wish to donate. Some have supervisory and management staff who can participate in the training; others may wish to restrict their role to curriculum advice.

If you define the acceptable employer involvement too narrowly, you may lose a potential partner by making demands that are not appropriate or feasible for a given company. There is really no need to have all the partners participate in exactly the same way. Program developers ought to be as flexible in developing employer partnerships as they are in other aspects of designing training programs.

Given this, your most effective approach to an employer will be to explain the range of participation that you are seeking and then to negotiate with the particular employer about which of them he/she can meet. Sometimes, companies that are cautious about getting involved in an unfamiliar venture can be brought in as "junior partners" who provide only curriculum review or advisory board service. As their familiarity with your operation grows in many cases their participation in projects will increase too. One side-benefit of this is that such an employer may be able to suggest other companies who might be interested in joining the Advisory Board or who could make other kinds of contributions.

# Creating Formal Advisory Committees

Most of the training programs funded by the Bay State Skills Corporation include some form of employer Advisory Committee. Some committees meet only a few times a year, others meet considerably more frequently. These committees almost invariably serve as the forum for review of draft curricula, and often serve many other planning and programmatic functions as well. The most effective ones meet at least bi-monthly, and hold significant responsibility for the management of the program.

There are clear benefits to creating an Advisory Committee. The formal structure helps to convey the seriousness with which employer involvement is sought and to clarify the expectations on the part of all participants in the process.

A Corporate Advisory Committee, if approached positively, can be of enormous value to a skills training program. First of all, a committee is a way of institutionalizing corporate sponsorship of a training program. This in turn brings such tangible benefits as employer technical expertise and such intangible benefits as increased status for the program. A well-structured Advisory Committee can be a forum for developing policy and can bring expert knowledge about technical trends and employment prospects within individual industries to the attention of the SDA. More generally, an Advisory Committee can be the vehicle to plan, implement, and/or oversee each of the aspects of employer involvement outlined in Chapter Six.

Nevertheless, the benefits of Advisory Committees do not automatically occur simply by inviting a group of companies to serve. It is often the case that busy company managers find it difficult to attend Advisory Committee meetings at regular intervals. At times, the managers who would be the most useful are the ones with the least time available.

Therefore, efforts to support an Advisory Committee structure often consume a great deal of staff time. Members of the committee must be carefully selected, reminded about meetings, and given the opportunity to make significant contributions to a program. Moreover, these activities must be handled by a staff member who is diplomatic enough to avoid becoming an irritant to the members of the committee.

The key to having an active Advisory Committee is to ensure that its contributions are used. Committee meetings must have an agenda that goes beyond the recitation of progress since the last meeting. Meetings must be planned and structured to facilitate members playing an active role in the meetings, and thereby in the program itself.

Throughout the program the essential component for having a vital Advisory Committee is the program coordinator's attempts to implement the Committee's input. No one likes to feel that their time is being wasted or that they are being patronized. On the other hand, there are few greater pleasures in life than feeling that one has contributed to the success of a worthwhile venture This, in turn, implies that those planning and running advisory group meetings must have the skills to involve the membership. An example of an exemplary use of an Advisory Committee appears below.

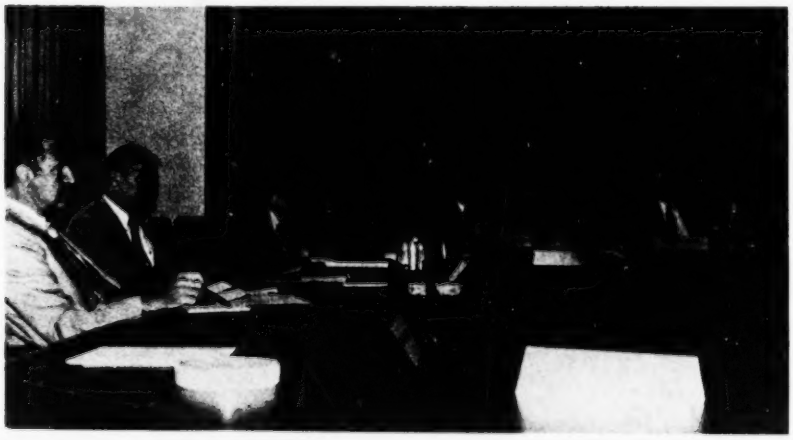
The program with the Chinatown Occupational Training Center in Boston involved training Limited English Speakers for clerical positions in hospitals. The training agency had been providing instruction in data entry and accounting, among other topics, but had not integrated the two skills. The project director, in looking at a medical journal, happened upon an article talking about new hospital data base applications, and decided to raise the topic for discussion at the next Advisory Committee meeting. The discussion was lively and highlighted the need for knowledgeable employees who could manipulate data already in the computer, especially for billing purposes.

Committee members took the data entry and accounting curricula to have them reviewed by the supervisors in their Patient Accounts Departments. These people made recommendations that resulted in a new course using special accounting software. This was very popular with the trainees because it did not place excessive demands on their English speaking skills.

Committee members would never have thought to volunteer the information, but in thoughtfully preparing for the meeting, the project coordinator obtained some useful curriculum advice and increased the sense of ownership of the private sector partners towards the program. This program placed more than 85% of the enrollees in jobs with average wages of $6.13 an hour.

## The Size of the Committee

There is no ideal size for an Advisory Committee. However, those who are responsible for the recruitment of committee members need to keep several competing concerns in mind. Large committees insure that the viewpoints of many firms are represented and can increase the total amount of time and other resources that will be available to the program. On the other hand, it is more difficult to obtain consensus from larger groups, thereby adding to the potential delays and/or frustrations on the part of the members of the committee. Meetings with large numbers of participants tend to be somewhat formal, and thus may inhibit free discussion.



*Advisory Committees are an effective way to obtain private sector input.*

It seems that Advisory Committees of between 7 and 12 members tend to be the most effective. Training agencies are advised to start with a core group of the most critical partners, and then assess each additional potential member of the committee in terms of the strengths that he or she brings versus the liabilities that any new member brings by making the committee larger.

## Who Should Serve

Training agencies are often in a quandary when they try to decide what kinds of corporate officials should be invited to serve on an Advisory Committee. The three most common choices are: the chief executive officers (CEOs) of the participating companies; representatives of personnel departments, or operating department heads and their line management.

*1. Chief Executive Officers*
The first reaction of many training agency staff is to try to involve the chief executive officers of the participating companies. Such an approach has both positive and negative aspects. Involvement of CEOs brings prestige and visibility to an Advisory Committee, and can promote the commitment of substantial corporate resources. The disadvantage, however, is that CEOs often are unable to attend meetings with any regularity and they do not necessarily know the detailed skill requirements for the positions you are training for. Chief Executive Officers are excellent choices for the Private Industry Council or other policy making boards, but may not be the most appropriate choice for a hands-on working committee.

*2. Personnel Managers*
Personnel managers are often assigned to Advisory Committees because their responsibilities encompass recruitment and hiring. While staff from personnel departments are often productive members of such committees, they also tend to have a number of important shortcomings that you should be aware of. They often lack knowledge about the specific skills necessary to do production work, and they are therefore not in a position to become directly involved with curriculum development efforts.

Furthermore, personnel officers are often outside of their company's production mainstream, and may not be in the best position to carry out such functions as identifying the best staff to provide guest lectures or conduct special demonstrations, or to know where there is surplus stock or machinery that could be donated as supplies or equipment.

*3. Operational Department Heads*
In many cases, operational department heads and/or their line management staff are the most effective Advisory Committee members. These people generally have the power to hire and fire, have sufficient influence within their companies to allocate resources to a program, and usually are familiar with the actual skills required to be successful on the job. Finally, they will be the direct employers of any of the trainees that are hired, and so they have a direct stake in the effectiveness of the training program. It is usually beneficial to have the CEO of a company appoint such a person to the committee.

## Different Settings for Meetings

Advisory Committee meetings do not always have to be discussions around a conference table. It can be very useful to arrange a breakfast meeting, a luncheon, or other reception where the committee members and trainees can meet and get to know one another. In the social setting trainees can, for example, ask questions about what people in a particular occupation do all day, and other questions that they might not ask in a more formal interview setting. Breakfast meetings, luncheons and seminars with the trainees also allow employers to learn more about potential employees including talents that they may have beyond their typing speed or skill on a lathe. More informed choices and decisions about job offers are frequently the result.

## Using the Committee to Critique Trainee Progress

Advisory Committees can be profitably employed to critique the trainees' skills at different points in the program, either through administering a pre-employment test in use at their firm or a technical interview. It is one thing to see a curriculum on paper, and another to determine if the trainees' mastery of the curriculum is sufficient for competitive employment.

Experience has shown that such sessions are most effective when committee members from different companies jointly participate in them. This makes it possible to determine the extent to which there are industry standards for the skill in question, and the extent to which the curriculum is successful in preparing clients to meet them.

Debriefing sessions with the instructor and program coordinator are critical elements of this kind of activity. Without them, it would be impossible to translate lessons learned from the corporate advisors into any needed curriculum revisions.

## Final Meetings

You should plan to have a final meeting of the Advisory Committee shortly after the completion of each training program. At this time, the committee can profitably be asked to review the curriculum in the light of the placement record of the trainees, to pinpoint where they think the newly hired trainees excel and which skills need overall improvement.

It is only after someone has gone to work that their mastery of a skill becomes evident, and therefore employer input from this phase is a critical portion of the overall functioning of an Advisory Committee. The final committee meeting can also provide a forum for addressing the issue of whether or not the training program has saturated the labor market in a particular skill or if there is a future—or even ongoing—need for such training. Frequently a new or related topic for training can be identified at such meetings.

*Advisory Committee meetings can be held in informal settings.*

# Maintaining Employer Involvement

Obtaining commitments from employers is only the first step in operating partnership training programs. You must also keep their interest throughout the program. To maintain employer participation, you must recognize that it won't happen all by itself, and you must be willing to commit the necessary resources to the effort.

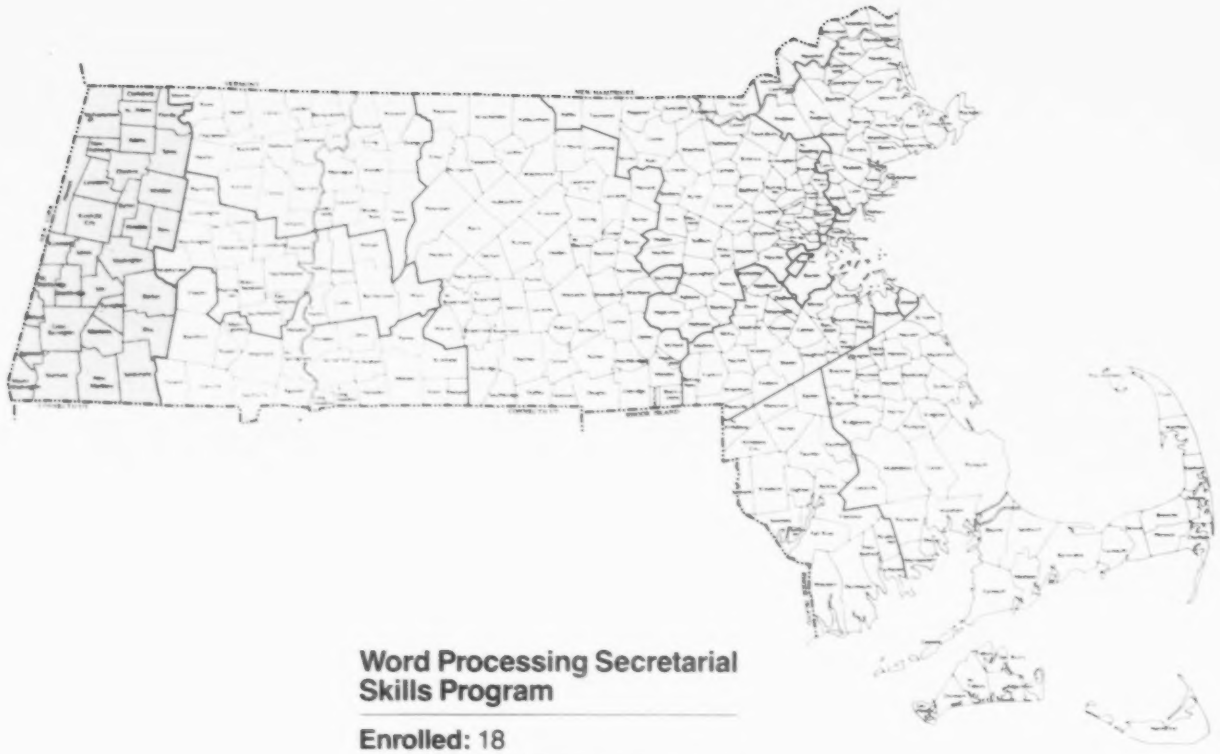
Many of the SDAs and training agencies that participated in the Demonstration Grant quickly came to the realization that they had to devote considerable staff time and resources to nurturing the employer participation in programs after they were put together. Successfully running a partnership program requires good organizational, supervisory, and management skills, such as:

- Making sure that agreements with employers are realistic, and do not place unreasonable demands on the partners time;
- Providing reminders about meetings and other commitments;
- Providing a steady stream of information about the progress of the training program;
- Maintaining informal telephone contacts with the partners;
- Monitoring to make sure that programs are going as planned;
- Demonstrating to the partners that their contributions are valuable and are essential to the functioning of the project;
- Continuing to develop new employer ties in case existing employers cannot follow through on their commitments for one reason or another;
- Taking steps to insure that the employers who are the most active participants receive recognition in the press and electronic media where appropriate, at public occasions such as trainee graduations, and at specific events such as recognition dinners; and
- Reinforcing your image as an effective organization by publicizing your program successes to both general and business audiences, and sharing credit for these successes with the business members of the partnership.

For the most part, the management techniques that you use to make sure that you deliver quality services will be the heart of your efforts to maintain private sector partnerships. If you cultivate a reputation for having good ideas, being concerned with quality, and making things happen, then you will find plenty of opportunities for partnerships, and your programs will be the better for it.

# Berkshire County Service Delivery Area

**Grant Recipient:**
Berkshire Training and Employment Program



**Word Processing Secretarial Skills Program**

**Enrolled:** 18

**Completed:** 16 (89%)

**Placed:** 11 (61%)

**Average Entry Wage:** $5.04

**BSSC Funding:** $26,220

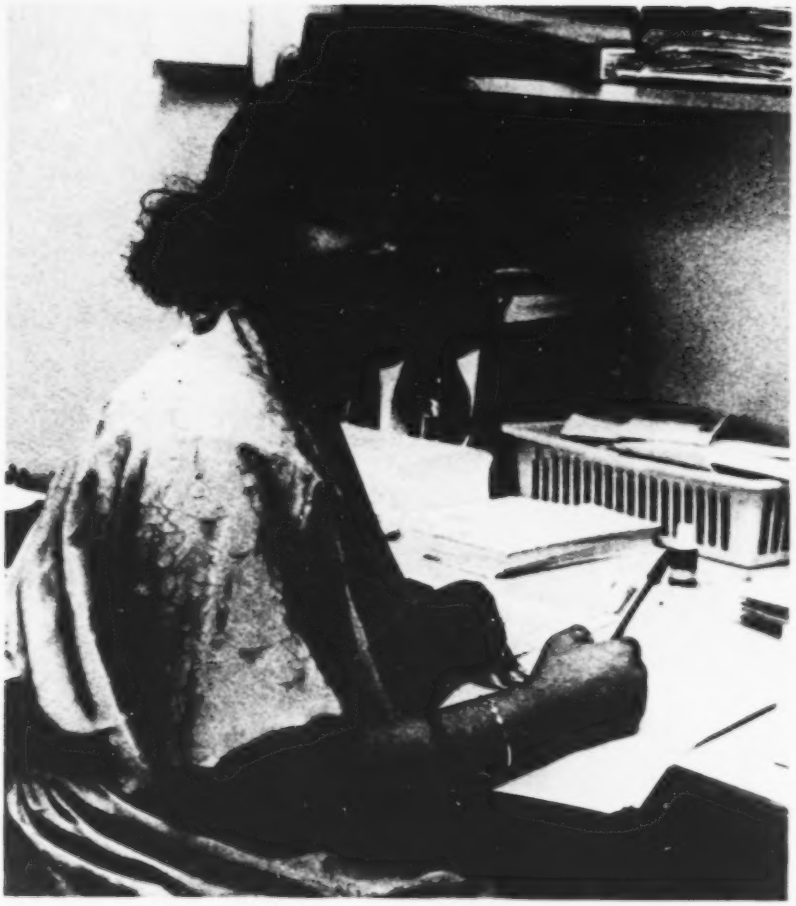
**Private Sector Match:** $26,459

**Participating Employers:**
Berkshire Life Insurance Company, General Electric Company, Kay Bee Toy Company, Sheaffer Eaton Textron, Sprague Electric Company

**Information Contacts:**
Daniel Collins
Berkshire Training and Employment Program
(413) 499-2220

Katerina Katsounakis
Berkshire Community College
(413) 499-4660

# Introduction



The Berkshire Employment and Training Program (BTEP) and Berkshire Community College (BCC) were co-administrators in a program to train 18 Title IIA eligible people in word processing, using the Bay State Skills Corporation model of public/private matching grants. In addition to training on IBM word processors, the program involved three allied courses also offered through the community college: business communications, business math, and typing.

Administration of the grant was the responsibility of BTEP, while substantive program operations, including hiring the instructor and working with the employers to co-ordinate plant tours, internships, and other forms of participation, were handled by the BCC staff. As the project advanced, the course instructor functioned with increasing independence in negotiating with employers and in other matters related to the course.

# Background

## The SDA and the Labor Market

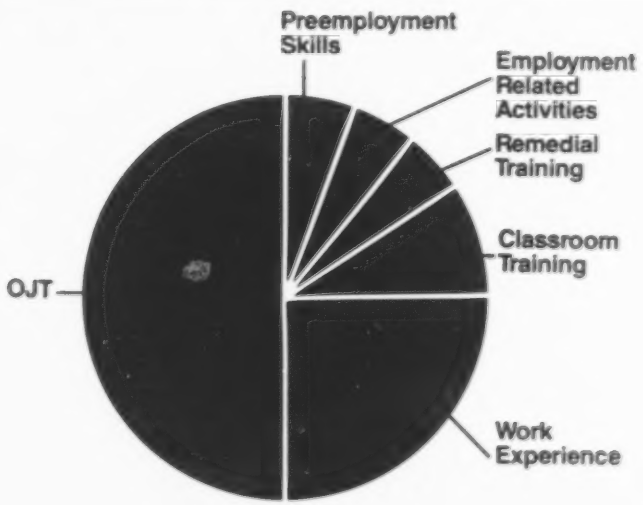
Comprising two labor market areas, Pittsfield and Great Barrington, the Berkshire Training and Employment Program serves an entire county in Western Massachusetts, as its name implies. This large geographic coverage takes in 32 towns and two small cities, Pittsfield and North Adams. It is predominantly rural, and it suffers from the lagging economy that much of the rest of the nation has experienced in recent years. It claims one of the highest unemployment rates in Massachusetts. Manufacturing, the main form of industry in the area, is on the decline: according to BTEP staff, a number of factories in mature industries, paper & textile mills, closed their doors in 1985.

With an annual budget of $1.2 million, the SDA serves 435 Title IIA clients and 350 Title IIB clients a year. It sub-contracts instructional services, making use of community colleges and vocational schools for classroom training, but allocates most of its funds to on the job training, which it administers in-house. The Service Delivery Area staff believe that the local economy has difficulty absorbing a group of people with similar skills seeking employment at any one time, and so prefer small open entry, open exit program designs.

The following charts summarize the JTPA eligible client populations of the SDA, the client population served by Title IIA, and the allocation of the SDA's training expenditures.

## Overview of SDA Clients and Services

| | JTPA Eligible Population | Title IIA Services |
|---|---|---|
| Female | 53% | 53% |
| <21 years old | 27% | 50% |
| >55 years old | 23% | 10% |
| Minority | 4.5% | 10% |
| Welfare recipients | NA | 34% |



# The Word Processing Training Program

## Program Model

Berkshire Training and Employment Program, through a sub-contract with Berkshire Community College, operated a twenty eight week program in Word Processing Secretarial Skills from May 1985 to February 1986. The enrollees were JTPA-eligible persons with basic skills on a sixth grade achievement level in written communication and mathematics. While principally focused on word processing, which would prepare trainees for secretarial jobs in many local industries, the program also included courses designed to upgrade the skills of trainees in Business Communications (basic writing), Introductory Accounting, and Math. Instruction was full-time for 24 hours per week, and students received 18 academic credits which could be applied toward an Associate Degree in Business Skills, upon completion of all four courses. All instruction was performed on campus, but plant tours and lectures by employer representatives were included, and morning internships with one of the participating employers occurred in the final month of the program. Classes were taught by college faculty who were recruited specifically for the course. The enrollees were a discrete group of students on campus, and the courses were specially designed to remediate any academic shortcomings in their backgrounds.

The classroom at Berkshire Community College was equiped with 24 IBM-PC's (floppy disk drive only) and two printers. While the training was done on these machines, considerable effort was made to familiarize trainees with the other word processing systems commonly used in offices in the area. Plant tours helped to accomplish this, and the instructor was quite well versed in different systems. Each of the four courses was based on offerings from the college's Business Technologies curriculum. This was the first time that the college had attempted to actively include employers in their business office skills courses.

Five companies participated and provided in-kind contributions to the program: Shaeffer Eaton Textron, General Electric, Berkshire Life, Kay Bee Toys, and Sprague Electric. Personnel from these firms formed an Advisory Board to the program, donating the services of a manager or supervisor of office services. This group met monthly for the duration of the program, to establish appropriate selection criteria for the enrollees, to review the curriculum proposed by the college and to arrange for guest lecturers, company tours and the internships as the program progressed. During the final weeks of the course, the advisory board members assisted in the job seeking skills training of the enrollees by conducting practice interviews, identifying propective positions within their companies and providing feedback to the instructor on the qualities of the people they interviewed.

## Developmental History

Adoption of the partnership approach to training was a totally new experience for all three parties involved: the SDA, the community college, and the private sector. The closest the SDA had come to partnerships with the private sector had been in the development of On-the-Job-Training contracts with local employers. There was a good deal of concern that employers in a fragile economy, with mature industries closing their doors and large numbers of dislocated workers needing jobs, would have no incentive to participate in training. Nevertheless, the Service Delivery Area decided to employ a consultant, who was a retired local businessman, to work with the head of the Secretarial Department at the local community college in order to discover if there was sufficient company interest in putting together a training program.

Together, these program developers created a list of the companies which they thought might need clerical help. They selected Word Processing as a skill to develop because the college already had capacity to deliver training in that occupation and because it was needed in a variety of companies. Jobs in word processing did not seem to be overly influenced by the economic rise and fall of specific industries. The instructor started her outreach to companies which employed several of the community college's graduates, and the consultant called upon former colleagues. In many cases they encountered reluctance from employers to get involved, because they made the mistake of trying to market the program either as a charitable endeavor or as a new "government initiative." However, in the course of their outreach they found one company which was planning to move its corporate headquarters to the area and three more which were large employers with ongoing need for clerical support staff. These companies clearly had a need which could be met by the training program, and so chose to participate. The fifth company which agreed to participate was responding to the marketing of the model as a new government initiative for employment policy and wished to seem cooperative, as it was about to lay-off a large portion of its work force!

The fact that the partnership training model was new to the area made the program developers cautious about requesting contributions from the private sector. Despite the fact that the college had only IBM word processors available for training, the developers did not seek donations of other types of equipment or software. They did however obtain tours and demonstrations of the different word processing systems in place at the participating companies, and they recruited a group of personnel who were interested in reviewing curriculum to make it responsive to their needs, and in monitoring the progress of specific trainees.

## Employer Participation

The focal point of the private sector participation in this training program was the Advisory Board. The five member board consisted of supervisors and managers of office services and MIS departments who had hands-ons experience with equipment. This group set the entry criteria for the trainees, reviewed the curriculum to insure its applicability to their needs, and identified times and topics where their presence in the classroom would be beneficial. They also spent several hours at the end of the instruction working with the trainees on their resumes and interview skills. The instructor, who was also the Program Co-ordinator, was in the habit of calling upon different board members to discuss the program, especially when individual students started their job hunting.

Each of the participating companies provided access to their facilities for plant tours and student exposure to different types of equipment. The students were able to see word processing and data entry operations as they exist in diverse types of business—insurance, manufacturing, and corporate headquarters. Each student had at least a half-day session at each of the companies, in which they were able to learn the differences between that equipment and the IBM's on which they were training. In the opinion of the Advisory Board, the ability to use different manufacturers' equipment, both main frames and micro-processor based word processing systems, is a hard-to-find asset in the work place.

All of the Advisory Board members were guest lecturers to the class, generally providing lectures on computer applications at their work places prior to the trainees' visits to their companies. Their lectures were not confined to word processing or data entry skills, but dealt with the business communications skills required of clerical help.

At about the fourteenth week, the instructor and Advisory Board agreed that the students would benefit from additional exposure to the work environment. An internship component was developed in which the trainees worked mornings at one of the participating companies and attended classes in the afternoon. Unfortunately, due to the lateness in the program when this innovation was introduced, the quality of internship experiences was varied. Several of them, however, led to good placements for the trainees.

Some of the companies were very actively involved in the program. In particular, Kay Bee Toys and Berkshire Life had sufficient contact with the trainees to hire them on conclusion of the program. These employers were sufficiently impressed with the program that they would like to continue the relationship. This willingness is significant, because Kay Bee Toys is establishing a new corporate headquarters in the Pittsfield area and expects to employ more than 100 new people, many of them clerical.

# Implementation/ Replication Issues

## The SDA Perspective

This course differs from previous JTPA programs in Berkshire County because it prepared students for a more "high tech" job than usual. That change was facilitated by the inclusion of the private sector in the training, because local companies are rapidly converting to automated offices.

Curriculum development was based on regular courses offered at the community college: typing; word processing, accounting, and business communications are found in the catalog. The instructor modified these courses to take into consideration the needs of the students who made up the classes. When contracting with colleges for skills training, Service Delivery Areas need to be aware that curricula must be modified to address the remedial needs of the trainees, as well as the skill needs of potential employers.

This program was also different from other programs conducted by the Service Delivery Area because the level of monitoring was higher. Monitoring imposes some burdens on staff but has the benefit of identifying trouble spots before they get too large to correct. Staff from the Service Delivery Area and Bay State Skills Corporation visited the training program at least once every six weeks, and were able to help the Project Co-ordinator develop placement strategies and keep the private sector partners involved.

College instructors prefer to begin courses in September, which matches the starting time of their other courses and also fits the schedules of women whose children are returning to school. For the enrollees in this program, instruction covered two academic terms. The trainees experienced financial hardship going so long without a job. Part-time courses which permit participants to hold a concurrent part-time job help with the problem.

This program highlighted issues related to regional economic problems. Western Massachusetts tests whether a program like the matching grants can work in a sparse economic setting that resembles numerous others in the country. The population is dispersed, and industry, while turning away from manufacturing, has not yet fully embraced a service economy and certainly not high technology. As a result, there is uncertainty about the future and highly conservative decision making. In the present case this took the form of extreme reluctance to commit to hiring any set number of individuals at any time in the future.

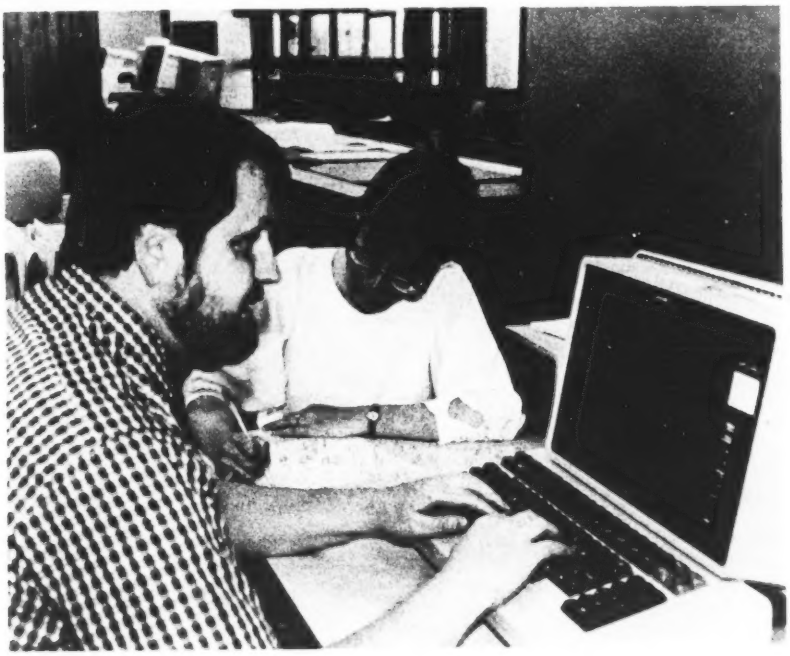
For a program with low income eligibility requirements, a mildly favorable employment picture can actually accentuate the problem. Most people with reasonable job skills have secured employment. Those who have not are lower skilled than are the unemployed in a high unemployment era. At the same time, as industry gradually turns toward automation and higher technology, its need for workers with verbal, numerical, and computer literacy skills increase. A displaced factory worker cannot always be retrained as a technician, because remedial education is needed before the job skills can be taught. This process typically takes more than a few months and requires substantial resources. Thus even in the face of real and profound social need, as when an industry closes leaving hundreds of displaced workers in its wake, there is a tremendous need for Service Delivery Areas to work cooperatively with industry in order to be sure that the services which it proposes to deliver are addressing the entire problem.

## The Employer Perspective

Employers were involved to varying degrees in this partnership. The Office Services Manager of Kay Bee Toys was enthusiastic about the program, though cautious in making a hiring decision.

His advice to other employers considering participating in the program is not be scared off by the commitments. There is more flexibility than there appears to be. (This statement actually reflects the employer's perception of the instructor, who essentially personifies the program.) He believes a set of guidelines for figuring the match would be helpful, as would a statement of the program objective at the outset.

The employer is sufficiently impressed with the program that he would sign up again. This willingness could be significant, because Kay Bee Toys is establishing a new corporate headquarters in the Pittsfield area and expects to employ more than 100 new people, many of them clerical, within the next year or so.



# Boston Service Delivery Area

**Grant Recipient:**
City of Boston
Mayor's Office of Jobs
and Community Services

## Medical Clerical Skills Training

**Enrolled:** 63

**Completed:** 56 (89%)

**Placed:** 50 (80%)

**Average Entry Wage:** $6.12

**BSSC Funding:** $82,970

**Private Sector Match:** $93,048

**Contractor:**
Chinatown Occupational Training Center

**Participating Employers:**
New England Medical Center, Mt. Auburn Hospital

## Unit Clerk Training

**Enrolled:** 13

**Completed:** 12 (85%)

**Placed:** 9 (70%)

**Average Entry Wage:** $6.08

**BSSC Funding:** $33,653

**Private Sector Match:** $33,658

**Contractor:**
Action for Boston Community Development (ABCD)

**Participating Employers:**
University Hospital, New England Medical Center, Brigham and Women's Hospital, Veterans Administration Medical Center

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Mayor's Office of Jobs
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(617) 720-4300

George Moriarity
Boston Private Industry Council
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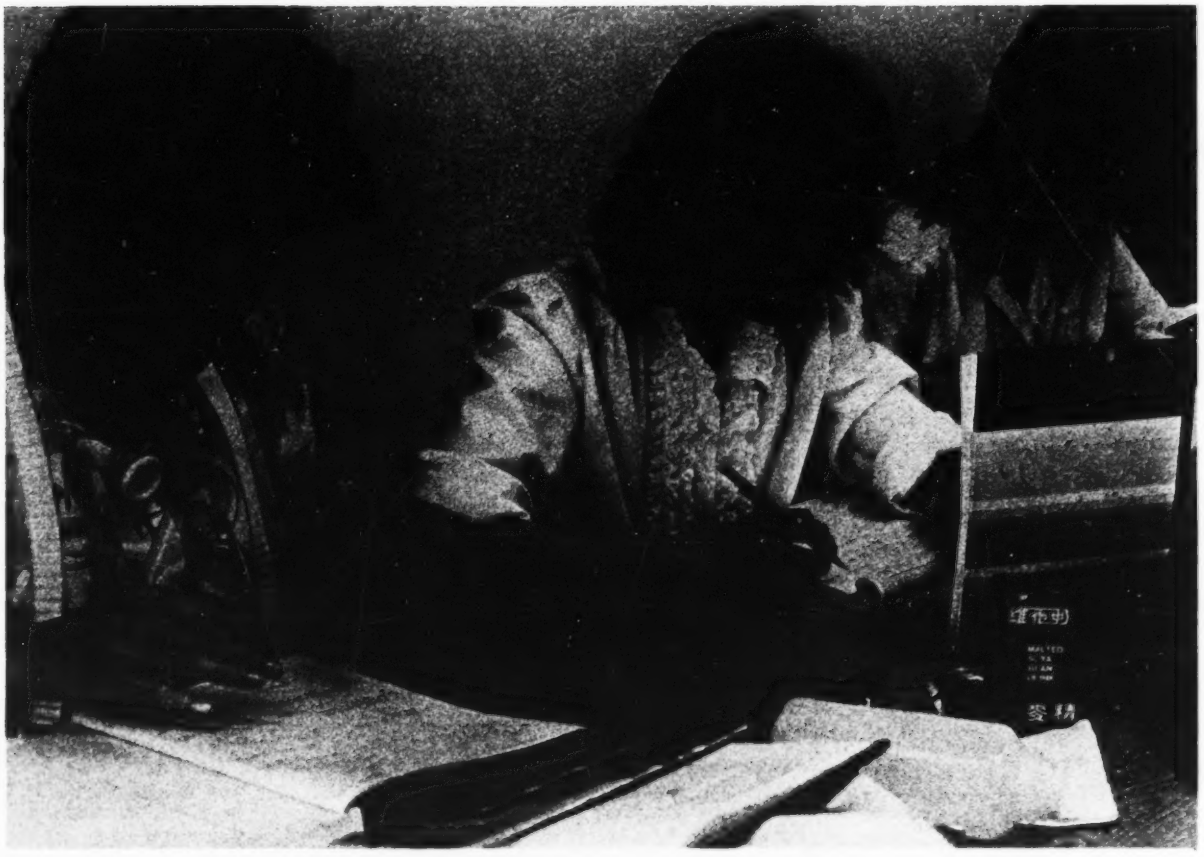
Jay Ostrower
Action for Boston Community Development
(617) 357-6000

David Elliott
Chinatown Occupational Training Center
(617) 542-2603

# Introduction



The Boston SDA funded two training programs under the Department of Labor Demonstration Grant Program: a medical/clerical training program that was developed and implemented by a Chinese community agency in close coordination with one of the city's leading teaching hospitals, and a unit clerk training program that was put together by the city's community action agency in coordination with a consortium of four area hospitals.

These programs obtained a significant level of business participation because of the Boston Private Industry Council's long-standing commitment to maximizing private sector involvement in all of its activities. The Boston PIC, SDA officials, training agency staff, and participating employers believe that the results of the two training programs validate this commitment.

# Background

## The Service Delivery Area

With a population of just over 600,000, Boston is the largest city in New England and the capital of Massachusetts. Boston was one of the original Prime Sponsors under the Comprehensive Employment and Training Act, and retained the same administrative entity and boundaries when it became a Service Delivery Area under the Job Training Partnership Act.

In Program Year 1984, the Boston Private Industry Council and SDA supported an estimated $10.85 million in education and training activities, including roughly $6 million in JTPA Titles IIA and IIB, and just under $5 million from such other sources as Community Development Block Grants, the Emergency Jobs Bill, the local housing authority, and other public programs, foundations, and corporations. The SDA contracts out all adult training programs to community based organizations with training centers and to public and private secondary and post secondary schools.

Under the leadership of its PIC, the Boston SDA has become a national pacesetter in programming that involves business in job training activities. The Boston Compact is a widely heralded three-way partnership between the SDA, the public school system, and local employers, designed to improve the quality of the city's public high schools as evidenced in lower dropout rates, achievement of basic skills, job placement, and enrollment in higher education.

The SDA commitment to employer involvement is carried through in its Request For Proposals for adult training programs, which requires that *all* programs encompass active participation of employers through contribution valued at a minimum of 15 percent of the total program costs. It also sets aside some funding for "Business Partnership" grants that require a dollar-for-dollar match from private firms.

Both the Boston PIC and the SDA administrative entity were anxious to participate in the Demonstration Grant program because, in the words of one of them:

*The BSSC matching grant philosophy is similar to our own approach in terms of money, involvement of employers, curriculum development, and related issues. The key issue for both of us is substantive involvement of the firms.*

*The objectives of the Demonstration Grant are completely compatible with what we've been trying to do for years. There is no difference in the type of training or relationship with employers.*

## The Labor Market

The Boston labor market is large, with over 500,000 jobs in 1980. This number is roughly twice the number of city residents in the labor force, and therefore many of the jobs are held by commuters from the suburbs.

The diversity of the Boston economy can be illustrated by the distribution of jobs: services represent about a third of the total, with another half divided about equally among government, trade, and finance. Manufacturing jobs represent about a tenth of the total, reflecting a decline that started in the city in the 1940s and 1950s but has recently been reversed in the Boston suburbs. According to the SDA's PY 1984 plan:

*[Service jobs in Boston represent] a spectrum of jobs which vary in pay, rate of growth, and skill requirements. Because of this variety, it is hazardous to make general statements such as "Service jobs pay poorly" or "All manufacturing is on the decline."*

Many of the hospitals and health-related facilities in the Boston area are known throughout the world. Total employment in the health industry in the city was about 55,000 in 1980, a number that exceeds the total number of manufacturing jobs and qualifies health-related services a one of the three largest industries in town, along with business services and state and local government.

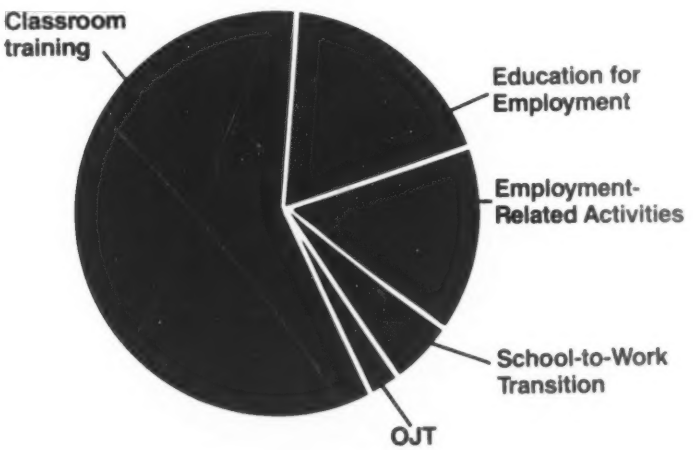
A 1976 study suggested that growth in hospital jobs would far outstrip growth in any other Boston industry. A 1983 projection suggested that the number of health-related occupations would continue growing at a rate greater than 25 percent through the year 1990.

## Overview of SDA Clients and Services

Planned enrollment for PY 1984 Title IIA programming was roughly 1400 youth and 1500 adults. The SDA planned to serve substantial population segments in the following proportions:

| | |
|---|---|
| Women | 45% |
| <21 years old | 48% |
| >55 years old | 1% |
| Minority | 68% |
| Welfare recipients | 35% |
| High school dropouts | 41% |

As illustrated below, in PY 1984, the SDA planned to invest the majority of its Title IIA training expenditures on classroom training (55 percent). On the other hand, the $10,000 allocated for OJT was only one-third of one percent of the SDA's planned training expenditures.



In keeping with Boston's tradition of decentralized program development and operation, planning for the two specific projects funded under the Demonstration Grant program was subcontracted to the city's service deliverers. After becoming aware of the funding, PIC staff contacted each of the SDA's training agencies to determine which of them were currently planning projects whose program model would be appropriate for the demonstration.

An extensive screening process ensued, and eventually, proposals from two training agencies were selected for submission to BSSC reviewers. The Chinese Occupational Training Center (COTC) was to chosen to develop a medical/clerical program aimed primarily upon Boston's Asian community. Action for Boston Community Development (ABCD), the city's antipoverty agency, was funded to do training for hospital unit clerks. Each of these projects is discussed separately below.

# The Medical/Clerical Training Program

## Program Model

The Chinese Occupational Training Center (COTC) medical/clerical training program encompassed three twenty week cycles for twenty trainees each. The first seventeen weeks of each cycle consisted of classroom training in bookkeeping (including business math and calculator operations), filing and office practices, typing, data entry, medical terminology, English as a Second Language, and job readiness skills. The final weeks consisted of full-time unpaid internships with the participating employers, the New England Medical Center and Mount Auburn Hospital.

Enrollees received six hours of training per day for five days a week. Instruction was provided by a full time Business Education teacher and a part time English as a Second Language instructor who also worked as a job developer/internship co-ordinator. All instruction was in English, and enrollees were encouraged to speak only English during the program—even during breaks for lunch. This was considered essential if the trainees—many of whom had been in the country for less than two years—were to become sufficiently fluent to compete for clerical jobs.

Lessons learned by COTC during the first cycle contributed to changes in subsequent ones. The trainees felt that the three week internship in the first cycle was not long enough to learn the job; hospital staff also felt that three weeks was too short for them to assess the abilities of individual interns. Therefore, in the second and third cycles, the internships were extended to cover six weeks.

Hospital staff determined which departments were most appropriate for interns, relying primarily upon their understanding of the abilities of the interns and current job openings. Potential supervisors of the interns generally welcomed the opportunity to obtain their services. As a hospital staff member recalls, "I would ask [line] hospital supervisors, 'Can you use some help', and no one ever said 'No'."

To qualify for the program, applicants were required to have at least sixth grade computation and English reading skills and good manual dexterity. There were assessed using the Test of Adult Basic Education (TABE) and were interviewed by the Program Coordinator to determine their willingness to leave their neighborhood to obtain employment. All applications in the second and third cycles, complete with test results and interview notes, were shared with members of the Advisory Board prior to final selections being made.

Job development for this program was very much influenced by employers perceptions of the trainees English language fluency. Internships were useful in demonstrating their capacity to operate effectively in the workplace. The job developer also video taped some practice interviews with the trainees and, showed them at advisory board meetings to involve members in the job development efforts.

## Developmental History

New England Medical Center (NEMC) is located on the border of Boston's Chinatown. It had made a committment of hospital funds to support job training programs for local residents provided the community could match it with funds from other sources. This commitment was part of a broader agreement to obtain the support of the Chinese community for proposals to expand the Center's facilities.

Planning for the training program began with a series of meetings between COTC and NEMC staff. At these meetings, efforts were made to identify a number of occupations within the hospital that would experience high demand in the coming years, such as medical records clerk and data entry operator.

Once these occupational areas were identified, the staff members undertook joint efforts to specify entrance requirements for these jobs and the kinds of training that would be necessary to qualify members of Boston's Asian community to fill them.

According to one participant in the planning process, the curriculum development for the medical/clerical training program represented a partnership with "true give and take" in which COTC solicited input from New England Medical Center staff and responded to it whenever it was offered.

Afterwards, the Chinatown agency approached other hospital Personnel Departments to obtain their participation on an Advisory Committee and as internship sites, in order to provide a broader base of support for the training program.

## Employer Participation

The New England Medical Center contributions to the development of the training program included a $50,000 cash grant to help cover administrative and start-up costs; designation of job titles that would be in high demand; assistance in the development of a training curriculum that would be appropriate for members of Boston's Asian community; development, management and monitoring of program internships; provision of lectures, seminars, and tours; and agreement to give "priority consideration" to all program graduates for employment at the hospital.

The cash match was used for a variety of purposes; roughly a quarter of it went for training staff, two-fifths went for purchased equipment such as calculators and typewriters, and the remainder went for such purposes as renting training space convenient to the community, purchasing training materials, and paying administrative overhead expenses.

Although hospital staff offered to play a role in screening potential trainees, plans to develop such a role "fell through the cracks," according to one participant in the planning process, and no such screening took place.

While New England Medical Center played the leading role in planning and overseeing the medical/clerical training program, COTC also created a multi-employer advisory board to oversee the program. During the initial training cycles, the board consisted only of hospital staff but after a number of trainees obtained employment in insurance companies and medical laboratories settings, COTC planned to expand membership on this board to firms which were interested in hiring program graduates, especially medical insurance companies.

# The Unit Clerk Training Program

## Program Model

Although the job varies somewhat from setting to setting, unit clerks generally have a variety of responsibilities in hospitals, including scheduling lab work, discharging patients, conducting a daily census, transcribing doctors' orders, recordkeeping, and maintaining equipment and supplies.

The curriculum for the unit clerk training program included seven weeks of classroom training at Bunker Hill Community College, followed by one week of "world of work orientation skills training" conducted by an Action for Boston Community Development staff person, followed in turn by a seven-week internship at participating Boston hospitals. At the community college, thirteen trainees received 210 hours of training in health care skills development, unit clerk skills, medical terminology, and typing. These courses were condensations of four courses from the college's Allied Health Professions curriculum. Those who satisfactorily completed the coursework received nine college credits. Intensive training programs in which students attend class for 25 hours a week provide the same number of contact hours as the regular academic semester in half the time.

During the classroom and world of work training sessions, hospital representatives conducted panel discussions on the unit clerk job and work setting, provided tours of their institutions, and interviewed some potential interns for their sites.

During the internship phase, trainees were assigned to specific units in participating hospitals where they carried out regualar unit clerk assignments under the oversight of a hospital employee known as a "buddy." At one of the hospitals, the trainee interns rotated through three different units to get a feeling for each.

ABCD staff monitored trainee progress during the internships and were available to provide counseling and support services. Although it was hoped that most trainees would transfer to full-time work at their internship sites, this was not always possible. In these cases, ABCD and hospital staff worked with the trainees to find other suitable job openings.

## Developmental History

ABCD is the largest human services agency in New England. It is a private non-profit organization serving low-income city residents through a citywide network of decentralized, neighborhood based agencies.

The initial ABCD efforts to develop a health-oriented program centered on a customized training effort for one of Boston's largest health maintenance organizations. When that institution decided not to pursue this option any further, ABCD began meeting with representatives of area hospitals to develop a unit clerk training program in collaboration with four of them. These activities were facilitated by close ties between ABCD and hospital staff that had developed in the course of previous training programs and by the availability of the curricula from these programs. Because of the fast growth of employment in Boston hospitals, ABCD had no difficulty obtaining commitments for participation in the unit clerk training.

## Employer Participation

The employer role in the design and oversight of the training program included review of the curriculum developed by the training agency, administration and monitoring of the internship efforts (including orientation to the hospitals), and assistance in placement of trainees. The hospital reviewers of the unit clerk curriculum developed by ABCD did not suggest many changes, probably because the proposed curriculum was based on a similar program that the training agency had run in the past with extensive employer input.

Hospital staff were offered the opportunity to interview potential trainees before the unit clerk program got under way, but in many cases they declined to do so. Several of them would reverse this decision in future training efforts. Hospital staff led tours of their institutions while trainees were still in the classroom phase of the program, and donated the time to supervise and monitor the interns.

Since ABCD already had a general health careers advisory committee in place, it was not considered necessary to set up a new advisory group for the unit clerk training program. The planned private sector match exceeded the BSSC support for the program by almost ten percent; roughly three quarters of the match consisted of supervision and related support for trainees during their internships, and about a fifth of the match consisted of the value of the training space.

# Implementation/ Replication Issues

## Unique Elements and Common Patterns

The planning and implementation of the medical/clerical and unit clerk training projects were clearly facilitated by the years of experience that the Boston PIC and its training contractors had with employer involvement in training programs.

COTC and other Chinese community organizations had been involved in negotiations with New England Medical Center over hiring and training issues, and ABCD had previous experience with training for hospital positions. Their ability to put the programs together was bolstered by their previous experience with training developed with extensive employer input and by the personal ties they had developed with hospital staff as a result of these previous training efforts. As one staff member put it:

*You've got to have working relationships with employers in advance if you have to move quickly in developing a training program with extensive employer involvement, especially if you are going to deal with multiple employers.*

Both training agencies reported that they encountered some difficulties in recruiting appropriate clients. Differences of opinion arose at one time between the staff of the SDA and one of the training agencies about the most appropriate types of trainees for the program. SDA staff felt that some of the prospective trainees were more appropriate for direct placement than skills training, while the training agency disagreed. In all likelihood, these differences are not unique to the Boston SDA, since the question of who should be trained is a central one throughout the JTPA system. The problem was exacerbated in Boston at the time these programs were recruiting because unemployment rates were so low that there was not a ready pool of qualified applicants seeking training.

## The SDA Perspective

As Boston PIC and SDA staff saw it, their experiences with the medical/clerical and unit clerk programs further justified their ongoing commitment to promoting active employer involvement in the design and oversight of employment and training programs. An SDA staff member observed:

*There is no difference between the BSSC projects and the other similar training programs funded by our SDA, in terms of program design, client entrance requirements, and so forth. . . .*

*Employer input into curriculum development is important, although the exact format does not matter—it could be active participation in planning meetings or a review meeting after training specialists have developed a draft curriculum. Achievement of the objective of a curriculum that meets employer needs is more important than the specifics of the process. . . .*

*The idea of internships is an excellent one. If done right, it can be an unqualified success in terms of clients learning what the work environment is really like and employers understanding what the clients are really like.*

Both their experience with the Demonstration Grant projects and their ongoing involvement with similar training programs convinced Boston officials that it takes time to build meaningful partnerships, and that efforts to develop such partnerships with employers must therefore transcend individual efforts to commit funds through a specific RFP. Ideally, there would be a

"pot of money" set aside year-round to permit a quick response to extraordinary training needs of employers. When such needs do arise, SDA officials feel it would not be hard to persuade employers to make substantial contributions to program planning and operation.

## The Training Agency Perspective

COTC and ABCD were generally pleased with the results of their Demonstration Grant efforts. However, both felt that they had learned lessons that would permit them to improve their delivery of training programs in the future. Both agreed that it is not realistic to expect a single employer to hire large numbers of trainees except in unusual circumstances.

Therefore, both training agencies felt that it was necessary to provide training that was broad enough to meet the needs of a number of employers. At the same time, COTC staff felt it was valuable to have a "lead employer" among the group of participating companies who provided the bulk of the input as well as an identity for the program in the eyes of potential trainees.

Both training agencies agreed that having an employer advisory committee was time-consuming, but could also be invaluable in ensuring that the program met the needs of employers. Staff in both agencies felt that there was value in having representatives of both personnel departments and first-line supervisors of the units that hire trainees serve on such groups.

COTC and ABCD officials felt that the internships were critical elements of their programs. As one of them put it:

*Internships are what got our people hired. Employers who would not have hired our people on the basis of an interview sometimes agreed to do so after an internship.*

Perhaps most importantly, both agencies agreed that it is important to go beyond paying lip service to employer involvement, and to take the time to develop meaningful relationships with the companies that may be hiring the trainees. They observed that it often takes outside encouragement, such as the guidelines imposed by a funding source, to get a training agency to take the extra steps in this direction.

For example, a staff member at one of the two agencies indicated that the BSSC 50/50 matching requirements led his agency to promote a higher level of employer involvement than the agency would otherwise have sought, but the agency was pleased with the result and planned to seek similar levels of involvement in other activities that did not require such a high match.

## The Employer Perspective

The employer assessment of the COTC and ABCD training programs has been mixed. All four hospitals have been pleased with the training curricula that have been developed, but there is a general feeling among many of them that there is room for improvement both in terms of employer involvement and in the results of the programs, i.e., the numbers of trainees who are considered employable and are eventually hired by the participating hospitals.

Hiring decisions represent the "bottom line" for assessing employer satisfaction with training programs. Three of the four hospitals participating in the unit clerk program hired at least half of the trainees who had served as interns at their institutions. Several of the hires represent instances in which hospital management temporarily suspended hiring freezes in order to take on the trainees. On the other hand, New England Medical Center hired only a minority of the medical/clerical trainees.

It is noteworthy that the instances in which participating hospitals did not hire trainees do *not* necessarily indicate dissatisfaction with the training program. In some cases, the trainees who were not hired rejected offers to work at the hospital or dropped out of internship programs to take training related positions elsewhere.

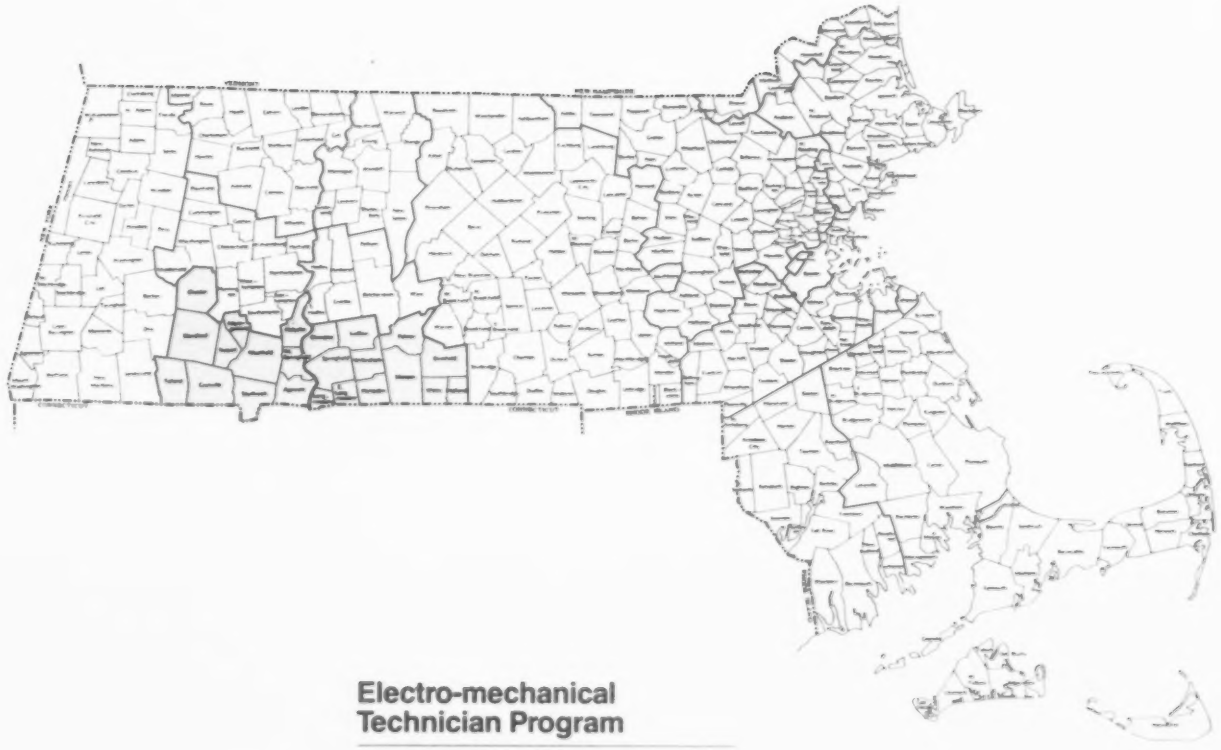
Employers in both training programs emphasized the importance of personal characteristics of the trainees, including their willingness to be punctual, have good attendance and good work attitudes. Many of these employers would be willing to spend time with the training agencies to help to pick the trainees and weed out those who don't look promising. As one of them put it:

*We put a lot of time into planning and oversight of this program, and it is really a waste of time if we don't get the right kind of trainees.*

Some hospital staff believe that it would be desirable to replace the unpaid internships with ones that had a stipend attached. This would demonstrate seriousness of purpose to everyone concerned. However, these staff were unsure whether their institutions could afford to pay the stipends themselves. Personnel policy at one of the employers is designed to mitigate this problem to some extent by counting the beginning of the internship as the beginning of the period in which the "clock starts ticking" for accumulation of enough seniority to qualify for certain fringe benefits.

# Hampden County Service Delivery Area

**Grant Recipient:** Hampden County Employment & Training Consortium



**Electro-mechanical Technician Program**

**Enrolled:** 14

**Completed:** 12 (86%)

**Placed:** 11 (79%)

**Average Entry Wage:** $6.66

**BSSC Funding:** $40,000

**Private Sector Match:** $63,500

**Participating Employers:**
A.B. Dick Co., BayBank Valley, Digital Equipment Corp., Easco Hand Tools, General Electric Co., Hampden Engineering, Titeflex Corp.

**Information Contacts:**
Richard Neveu
Hampden County Employment & Training Consortium
(413) 781-6900

Norman Halls
Massachusetts Career Development Institute
(413) 781-5640

# Introduction

Hampden County Employment and Training Consortium, in collaboration with the Massachusetts Career Development Institute (MCDI) of Springfield, created and ran a program to train Title IIA eligible persons as electromechanical repair technicians. The program, which was run on the premises of the Massachusetts Career Development Institute, was the first of its kind and marked the innovative combination of electronic and mechanical skills development in a single curriculum. Because of its uniqueness, the designers of the course developed this curriculum from scratch.

# Background

## The Service Delivery Area

The Hampden County Private Industry Council predates JTPA, having been formed under Title VII of CETA. The SDA has been particularly active in funding a variety of employment and training programs. There is a very close association between the Massachusetts Career Development Institute (the skills center) and the SDA. There is also a close association with the Bay State Skills Corporation. Virtually since the inception of BSSC, the Springfield SDA and/or the Massachusetts Career Development Institute have sought funds to run various BSSC programs serving over 200 clients. These have included youth programs, Welfare Department programs, and a targeted jobs program.

Of a total population of 443,000, the SDA considers over 80,000 persons potentially eligible for JTPA programs. Its annual budget is $3.74 million, with approximately 63 percent going for Title IIA programs and the remainder for Title IIB. The Massachusetts Career Development Institute is a department of the city of Springfield; it conducts training (and usually recruitment) under contract with the SDA, which handles the planning and fiscal administration functions in-house.

To keep abreast of the job market and the needs of industry, the SDA and skills center staff belong to many business associations and attend frequent meetings with industry executives. They appear to make good use of extensive and long-standing contacts in the business community, and as a result they are well informed about current needs, trends, and economic conditions. Their familiarity with business conditions and individuals has repeatedly enabled them to secure training, matching, and hiring agreements with local companies.

## The Labor Market

As in much of western Massachusetts, the labor market is based on small manufacturing (not currently in a growth mode) and service industries, the latter employing an increasingly large proportion of the work force. Both the SDA and the MCDI staff agree that the economy of the Springfield area is improving but is not yet robust. Employers in general are not sanguine about the future and thus are cautious about programs that might raise expectations that they would hire a certain number of individuals six months later. They view any hiring commitment as much more serious than the 50-50 matching requirement, in that the former represents by far the larger investment in the long term.

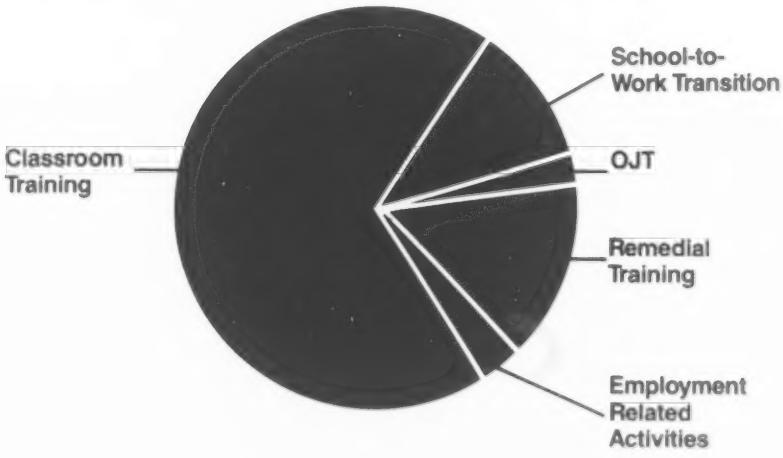
Only the largest companies have staff available to do training. Most have difficulty providing personnel, even if they can make the cash match. In addition, many manufacturing firms are not optimal training sites, since they have, over the years, let their equipment get out of date. Thus the productivity level of companies in the manufacturing sector tends to be low, quality sometimes suffers, and their economic footing is seen as precarious.

In addition, appropriate job candidates are not as easy to find as might be supposed. Many people in this labor market area speak English as a Second Language or have other educational disadvantages that make them hard to employ in the more technical economy toward which the region is gradually moving. The SDA often finds it must work to bring individuals up to appropriate levels in reading and mathematics before they can qualify for a job training program in the first place.

## Overview of the SDA Clients and Services

These charts summarize the JTPA eligible client population of the SDA, the client population served by Title IIA, and the allocation of the SDA's training expenditures as reported in the SDA's Job Training Plan for program year 1984.

| | JTPA Eligible Population | Title IIA Services |
|---|---|---|
| Female | 63% | 47.5% |
| <21 years old | 27% | 40% |
| >55 years old | 28% | 4% |
| Minority | 32% | 44% |
| Welfare recipients | NA | 35% |



# The Electro-mechanical Technician Training Program

## Program Model

The Massachusetts Career Development Institute developed a nine-month curriculum, covering blueprint reading, shop techniques, advanced pneumatics, hydraulics, electronics, robotics, and troubleshooting. It also included a two-week internship with participating companies. Instruction was offered on the premises of MCDI, using both classroom settings and a simulated shop environment with equipment provided by various companies as part of the matching provision of the grant. Company tours and lectures were also included.

The course curriculum was pitched at an advanced technical level. It had a heavy theoretical component, using college-level texts in electrical engineering. Trainees were required to learn equations for resistance and impedance, to memorize circuit diagrams and understand current flow, and to calculate the values of electrical parameters. They also had to keep detailed notes on their laboratory work and do one to two hours of assigned homework daily.

In the shop, they were exposed to a variety of industrial equipment that is controlled electronically. It was their job to disassemble the equipment, analyze its functioning (or its reasons for not functioning), and reassemble it in proper working order.

Approximately the first half of the course was devoted to classroom instruction. This was followed by "hands-on" experience in the shop, interspersed with plant tours, lectures, and internships.

## Developmental History

As mentioned previously, the Springfield SDA has a history of working with Bay State Skills Corporation going back to 1981. Its staff believe in programs that stimulate greater business involvement; thus a program calling for not only a 50-50 match but a hiring commitment was philosophically attractive to them. The Massachusetts Career Development Institute (which operated the program) has a history of heavy industry involvement and was involved with an earlier effort by the Governor's office to establish a skills center.

MCDI had earlier run a machine repair training program. Their staff perceived that as machines came to involve more and more electronic parts, mere mechanical competency was no longer a sufficient skill for a repairman. What was needed was a program that would impart technological sophistication in electronics. A decision was made in the summer of 1984 to set up such a program. Given the staff's preference for strong industry involvement, it was felt that Bay State Skills Corporation program offering a 50-50 match was the most suitable one under which to apply for funds.

Industry support for the electro-mechanical technician training program was so strong that SDA staff were able to line up a $63,500 match. Originally they intended to train 23 individuals, but after consultation with Bay State Skills they agreed that a more realistic goal given the labor pool and the job market would be 14 trainees. The program that started in February 1985 was thus geared to that number, with a $40,000 match of DOL funds, though the original industry contribution remained.

## Employer Participation

The Institute has had a history of good cooperation from employers in other training programs. Employer involvement has in general been less heavy in other JTPA programs, but those sponsored by Bay State Skills have always called for strong involvement, and the SDA has been successful in securing it. In that respect the present program is no different. Because the employers involved here were very diverse, it was more difficult than usual to coordinate their participation in such areas as curriculum development and equipment donation.

In particular, private sector companies participated in the development of the curriculum, in providing instruction, in conducting plant tours, and in supplying equipment (essential to a program like this one) under the grant's matching provisions. They were not very much involved in the recruitment and selection of the trainees; that burden fell almost entirely on the staff of the Massachusetts Career Development Institute.

# Implementation/ Replication Issues

## Unique Elements and Common Patterns

The SDA is the official grantee, but it works so closely with the skills center (MCDI) that the director of operations of the SDA has an office at both locations. It is a highly proactive agency and works aggressively to develop grants in all aspects of employment and training. In this case, in spite of the acknowledged difficulty of securing matching funds or in-kind contributions from employers, a nearly 8-to-5 match was found for the funding from Bay State Skills. The additional funds were allocated to the purchase of new equipment.

The main feature distinguishing this program from many others funded under JTPA is the course content. It requires a higher educational background in the participants than do many other programs, and it prepares individuals for jobs well beyond entry level. As a result, recruitment was an especially demanding process.

To recruit the course participants, MCDI did its best to ensure that those finally selected would have a good chance of succeeding in the course. Advertisements were placed in newspapers. These yielded about two hundred phone calls, which the MCDI project director, screened himself. About fifty of the callers were encouraged to come in for an assessment. The assessment process lasted a full week: three days for eligibility determination, program explanations, and testing, and two days of scoring and follow-up counseling. About one person in five made it through this battery. Ten of the original fifty applicants were recruited this way; the other four were walk-ins. (An additional four trainees, with costs paid from other sources, brought course enrollment up to eighteen.) Counting the time involved in placing the ad and screening the calls, it took about a month to recruit a full complement of trainees.

Great emphasis was put on placement. Within MCDI there are three staff members from the Division of Employment Security working full-time under subcontract from the SDA to place graduates of the various training courses. Each has an average caseload of about fifteen trainees. As a result of this arrangement, the skills center was confident of its ability to place virtually every graduate. In fact there were four drop-outs: one who moved, one who went on to college, and two others on whom MCDI was unable to follow up, despite repeated attempts. Of the remaining fourteen trainees, only three had not been placed two weeks after the end of the course.

## The SDA Perspective

The SDA and MCDI staff were aware that they had an excellent program and were working hard to maintain that excellence. They put in considerable time beyond the strict requirements of their jobs, and they were familiar with most features of the program from the most global to the most mundane. While clearly committed to what they were doing and to the overall purposes of the program, they had definite ideas about features that needed improvement, especially if the program was to serve as a model and a catalyst for SDA involvement in other areas.

They observed that recruitment, in particular, is a costly and important element of the program, especially if done properly. Funds must be available specifically to cover recruitment costs, including not only newspaper ads and assessment, but the many hours of administrative and screening time involved in narrowing the field of candidates.

Even though a program of this sort serves a real need, it is not simply a matter of opening the door and letting the eligible candidates spill through. There are many applicants who are ineligible, and of the eligible ones, there are many who cannot be expected to succeed in a particular training program. Thus the entire recruitment process is seen as a key element in the success of the training and placement effort.

Secondly, the respondents felt that programs of this sort, given the demographics of western Massachusetts, will succeed better, and make a more lasting impact on the needs of the population, if they can be coupled with remedial programs for raising the educational level in basic reading, writing, and mathematical skills. This is particularly true with dislocated workers, many of whom obtained unskilled or semi-skilled employment years ago in a much different industrial environment. Ideally, this SDA would like to see unions and employers involved in skills upgrading programs *on the job*, before job obsolescence threatens. They think there could be a strong role to be played by a state agency in this process. At present there is support at the higher levels of the union hierarchy for such ideas, but very little at the rank and file or shop steward level, where the issue is seen as removed from immediate concerns like cost of living allowances and paid dental care.

Finally, it is important that the program model have sufficient flexibility to allow equipment purchases to be made out of excess funds in the match. Given the rapid obsolescence of equipment, this was seen as a key provision and one that should be routinely incorporated in contracts. The SDA sees it as important that the funding source be a strong advocate with employers on the subject of matching contributions, and to that end they think that a summary sheet, showing the typical costs associated with various types of contributions, would be quite helpful in "selling" the matching provisions.

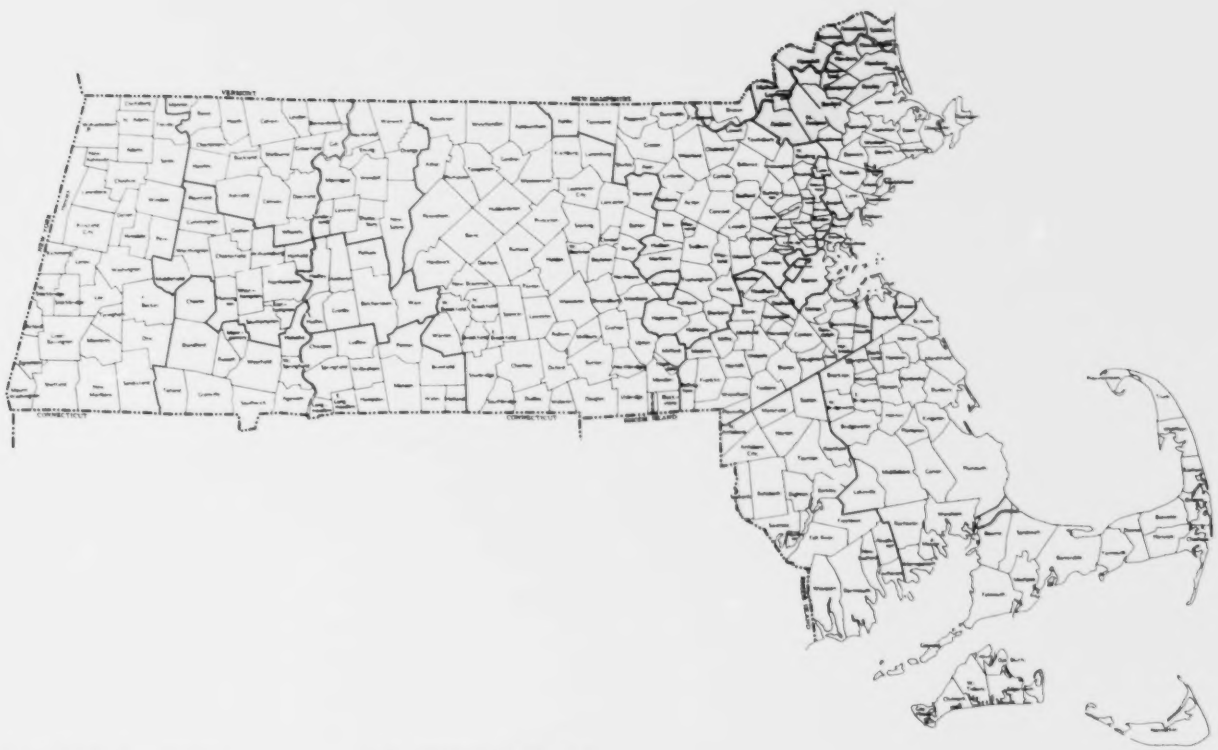
## The Employer Perspective

The plant manager of Hampden Engineering, a manufacturer of electronic testing and training equipment, spoke enthusiastically about the program. He had hired a trainee from the program who had spent a two-week internship. He said the program fully met his expectations. His company needs quite diverse technical skills in its employees, so a generic electro-mechanical training program like this one is well suited to its needs. In spite of the uncertain economy of the region, this company is doing well, with a worldwide business, and expects to grow over the next year or two. Hampden Engineering has participated in previous programs run by MCDI and sees such involvement as clearly in its corporate interests.

This was the first time the company had sat on a program advisory committee. Their advice to other companies contemplating such participation is that they should talk to the training provider to be sure the type of training is suited to their employment needs. If there is a good fit in that respect, they may be confident of finding suitable graduates to hire. The internship provision helps build this confidence. Hampden Engineering believes that the 50-50 match requirement seemed quite appropriate. "We got good value for our time and equipment."

# Lower Merrimack Valley Service Delivery Area

**Grant Recipient:**
City of Lawrence
Department of Training and Manpower Development
(DTMD)



**Bank Teller Program**

**Enrolled:** 43

**Completed:** 38 (94%)

**Placed:** 35 (83%)

**Average Entry Wage:** $5.25

**BSSC Funding:** $46,441

**Private Sector Match:** $51,316

**Participating Employers:**
Arlington Trust, Family Mutual Bank, Lawrence Savings Bank, Andover Savings Bank, Bank of Boston, First Essex Bank, Bank of New England

**Geriatric Nursing Assistant Program**

**Enrolled:** 49

**Completed:** 41 (84%)

**Placed:** 41 (84%)

**Average Entry Wage:** $4.84

**BSSC Funding:** $39,731

**Private Sector Match:** $42,369

**Participating Employer:**
The Hillhaven Corporation
(A Subsidiary of National Medical Enterprises, Inc.)

**SDA Contact for Information:**
Fran LaCerte
Training Manager, DTMD
(617) 685-3527



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# Introduction

The City of Lawrence Department of Training and Manpower Development (DTMD) operated two successful training programs for Title IIA eligible people using the Bay State Skills Corporation (BSSC) 50-50 matching model for private sector involvement. Although these programs were managed by a single DTMD staff member, and both could be characterized as having substantial employer involvement, they illustrate different approaches to obtaining private sector participation, and different ways of utilizing private sector input.

# Background

## The Service Delivery Area

The Lower Merrimack Valley Service Delivery Area (SDA) covers the northern part of MAP Essex County, in northeastern Massachusetts. The City of Lawrence Department of Training and Manpower Development (DTMD) serves as the grant recipient, but the SDA also serves 14 neighboring towns. The total SDA population in 1980 was 260,893.

The SDA had a total annual budget of $4.1 million in Fiscal Year 1985 from a number of JTPA funding sources. It no longer operates training programs itself; rather, it contracts for these services from community-based organizations, vocational schools, and community colleges. The SDA employs 48 full-time people, and retains client recruitment, assessment, and counseling functions, as well as planning, program development, fiscal, monitoring, and administrative responsibilities.

The current SDA was established in August of 1974 by the Mayor of Lawrence as a subgrantee of the Massachusetts Balance of State under CETA and never attained Prime Sponsor status. The Lawrence subgrantee had an active Title VII Private Industry Council (PIC) under CETA, and the JTPA PIC continues in this tradition. Its members include all of the major industry representatives in the region.

The SDA Mission Statement encompasses four broad objectives, one of which calls for "the development of a more positive relationship between the employment and training system and the private sector" through such tasks as "involving the private sector in the development and/or operation of [training] programs... and involving the private sector in the establishment and/or updating of skill training curricula."

## The Labor Market

Greater Lawrence was once known as the woolen manufacturing center of America. Today, according to the Lawrence Economic Development and Industrial Corporation, no single industry or industrial sector dominates the scene. Manufacturing is, however, the largest industrial sector within the local labor market with wholesale and retail trades second, services third, and government fourth. Products as diverse as food products, semi-conductors, and household detergents are manufactured in the area; and the U.S. Internal Revenue Service has a major processing center here.

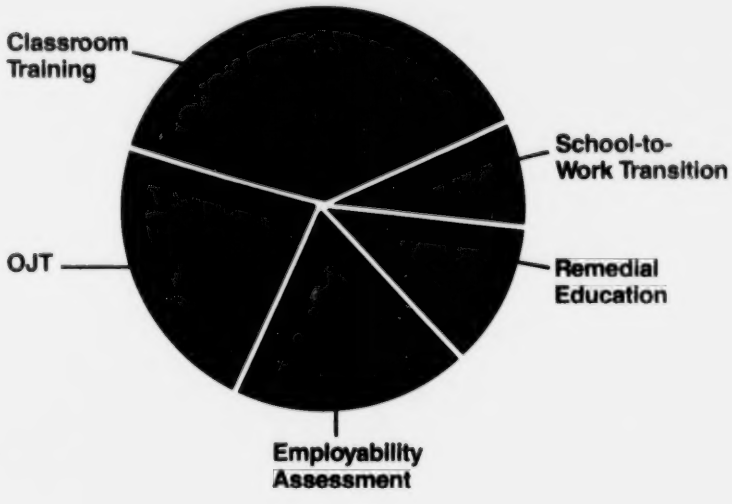
Economic conditions in the region are considered good. As of June, 1985, unemployment in the Lawrence labor market area was 5.9 percent. Although this figure is slightly above the state average, it is considered to be quite good for an area that had undergone substantial decline in the past few decades. There still are major pockets of economically disadvantaged persons, however, particularly among the Hispanic and Asian minorities. Lawrence was the site of a major civil disturbance during the summer of 1984, involving youths from the public housing projects.

## Overview of SDA Clients and Services

Lawrence DTMD sees over 5,000 people a year, 2500 of whom receive services. A large proportion of the people served require remedial education or English as a Second Language (ESL) instruction prior to being referred to occupational training. Occupational training is intentionally designed to be of short duration (under 3 months) so that enrollees can begin to receive an income as quickly as possible. The SDA primarily serves a population with little or no work history, poor educational attainment, and barriers to employment such as problems with housing, transportation, and child care.

The following charts summarize the JTPA eligible client population of the SDA, the client population served by Title IIA, and the allocation of the SDA's training expenditures (as reported in the SDA's Job Training Plan for Program Year 1984.)

| | JTPA Eligible Population | Title IIA Services |
|---|---|---|
| Female | 65% | 58% |
| <21 years old | 17% | 36% |
| >55 years old | 37% | 3% |
| Minority | 11% | 40% |
| Welfare recipients | NA | 37% |
| High School Dropouts | 46% | 45% |



# The Geriatric Nursing Assistant Training Program

## Program Model

DTMD conducted four eight-week cycles of training for Geriatric Nursing Assistants for persons with limited English speaking capability. The training was provided at the Winfield House Convalescent Home in Lawrence, in conjunction with the Hillhaven Corporation which owns and operates several nursing homes in the SDA. Trainees spent five weeks in classroom instruction and clinical experience learning basic nursing skills and the fundamentals of anatomy and physiology. This was followed by three weeks of paid internship and supplementary classroom instruction. All trainees in need of English as a Second Language training participated in an ESL program throughout the training schedule.

Recruitment for the program was conducted by the Service Delivery Area, utilizing its network with other community organizations and feeder programs. The State Rehabilitation Commission, Department of Public Welfare and Employment Service were requested to refer trainees, flyers were distributed at public housing developments and in church bulletins, and advertisements were placed in neighborhood newspapers in order to reach the population targeted for training.

The assessment process included administrating the Harrington O'Shea Career Decision Making Survey; the Adult Basic Learning Examination (ABLE)—Level II for 4th grade reading and math skills; and the Minnesota Rate of Manipulation to measure gross motor coordination. Applicants who met the minimal skill requirements deemed necessary to be able to complete the training were referred for interviews by SDA and Hillhaven Corporation personnel to assess their commitment to completing training and accepting employment at the end of the program.

The curriculum consisted of 270 hours of competency based instruction and clinical experiences in patient care, basic nursing practices, occupational and physical therapy techniques and health care techniques, taught by a Registered Nurse hired specifically for the program. Hillhaven Corporation provided guest lecturers on topics ranging from pharmaceutical information to issues of aging and death. Local hospitals also provided tours and lectures on the differences between acute and chronic care for the aged. During the final three weeks of training the trainees split their time between paid clinical experience at the Hillhaven Corporation and unpaid classroom instruction which was directly related to their rotating internship experiences. The Hillhaven Corporation insisted upon a good attendance record in the classroom portion of the training as a condition for participating in the paid internship. This provided an incentive for the students to complete their training.

Throughout the program, counseling was provided in weekly group sessions which addressed issues such as general labor market information, work maturity, job seeking skills and job retention skills. Individual counseling was provided as necessary to deal with day care, housing or other emergencies which could affect the trainee's ability to complete the program. Counseling was considered essential by both the SDA and Hillhaven Corporation because of the very limited personal resources and work histories of the trainees. Even with good skills training, the 84% completion rate is largely attributed to the supportive environment and clear work rules reinforced by both the Counselor and the Instructor in all their dealings with the trainees.

## Developmental History

DTMD had run previous training programs for nursing assistants prior to getting involved in the Demonstration Project, and these programs had involved partnerships with employers to a certain degree. In 1982, the Lawrence subgrantee used CETA funding to develop a pilot program for the training of rehabilitation nursing assistants. The nursing home involved valued this experience and pressed the CETA subgrantee for a larger program. This led to an application by Lawrence for a grant from BSSC for the training of AFDC recipients to be nursing assistants and aides in nursing homes.

The Geriatric Nursing Assistant Program built upon the SDA experiences with these previous programs. It started with an employer initiative, and was put together directly by SDA staff. The Hillhaven Corporation is a subsidiary of National Medical Enterprises, which owns and operates hundreds of nursing homes throughout the United States, including four in the Greater Lawrence area. Hillhaven Corporation was actively involved in promoting the training programs for two reasons: to help meet its pressing personnel needs and to provide job training for local residents in an area that had been marked by widespread civil disorders in the summer of 1984.

Hillhaven staff developed the initial idea of a training program for a nursing home that was in the middle of the neighborhood in which the disorders took place, and brought it to the attention of the mayor of Lawrence. The mayor, in turn, forwarded it to DTMD with his enthusiastic backing.

## Employer Participation

The Hillhaven Corporation played the lead role in developing the training curriculum and hiring the instructor, and it shared responsibility for selection of trainees with the SDA. The curriculum was developed by Hillhaven staff, and then reviewed by the SDA to make sure that it was appropriate not only for this employer but for broader nursing assistant employment opportunities. Only minor changes were necessary.

Hillhaven was responsible for placing advertisements in the newspaper for instructors and doing the initial screening. Hillhaven sent its choice for trainer to the SDA for an interview, and the SDA judged the individual to be well qualified and hired her.

The Hillhaven match to SDA funding for the training program went beyond paying for the internships, the facilities, and the training supplies. The firm also paid for an ESL course for trainees who were not English-speaking.

Potential trainees were recruited using traditional means available to DTMD, such as advertisements, and fliers and brochures distributed to Job Service and welfare offices. The Hillhaven Corporation helped in the recruitment process by referring job applicants who it was thought would benefit from the program. A Hillhaven representative sat in on the selection interviews, and according to an SDA official, "we learned a lot about the type of trainee that they wanted."

Although there was no formal SDA-employer structure to oversee the project, representatives of the JTPA agency and Hillhaven met frequently and talked on the telephone at least once a week.

# The Bank Teller Program

## Program Model

This program was designed to train 48 individuals for occupations as bank tellers and for related entry-level banking positions. It provided training in four eight-week cycles of 25 hours per week, and included a paid internship period during the last three weeks of training. The classroom training was provided at a DTMD training facility, and the internships were at the participating banks. The private sector contribution included paid internships, training materials and supplies, equipment, tours, and personnel time. The program was supervised by an advisory committee made up of representatives from seven banks in the Greater Lawrence area.

Recruitment for this training program was conducted by the Service Delivery Area, using much the same approach as for the Geriatric Nursing Assistant Program. In addition, the participating banks aided by identifying and referring job applicants who looked promising but did not seem capable of succeeding in the banks' intensive two-week on the job training for new employees.

Criteria for selection into the program were mutually established by the Service Delivery Area and the participating banks. Requirements included: eighth grade reading and math skills, average clerical perception, desire to work with people, and demonstrated work maturity. Preference was given to candidates who visualized the training as a stepping stone towards advancement in a banking career.

A five day situational assessment was used to evaluate applicants for work maturity, motivation, and classroom performance. This period offered the applicant an opportunity to objectively assess his/her abilities and interest in a banking career. At the end of that time, the instructor, a bank representative and a career counselor made the final selection for acceptance into the program.

The first five weeks of training consisted of 125 hours of competency based instruction covering an overview of the banking industry's regulations and governing boards, basic typing and communication skills, a math review, drawer transactions, business machine operation, basic accounting principles and procedures, and security and prevention techniques used in the banking industry. During the last three weeks of training the trainee alternated between one full day of paid work at a bank and one day of customized instruction geared to resolve problems that arose on the job.

Throughout the eight weeks of the program, enrollees participated in 1½ hours per week of career counseling. Topics included career awareness, self confidence, job seeking skills, and job retention abilities. Participating banks sent personnel to present information on job opportunities and to provide realistic practice job interviews.

## Developmental History

When the BSSC Demonstration Grant Program was announced, SDA staff had been analyzing the local labor market to identify growth occupations that might be used for training programs. One of them noticed in the local want ads that banks seemed to always need new tellers. He called representatives from seven of these banks to see if they would support a grant application.

This SDA initiative came at a time when it was becoming difficult to attract entry-level tellers who could be adequately prepared with the two week OJT that was standard in the banking industry. Those who were trainable were no

longer applying as frequently as they had in the past; those who were applying were often not trainable with the traditional approaches. The banks needed a new approach to training entry-level staff.

The DTMD Training Manager visited the Personnel Managers of banks which had been advertising for tellers in the local papers. Initially he encountered skepticism that people from a disadvantaged background could perform well in banking. The SDA undertook an assertive marketing campaign featuring its assessment and pre-vocational programs as well as its willingness to design a program that would specifically meet the banks' needs in order to address this industry's resistance. A technique that seemed to be pivotal in obtaining the commitment of banks to participate was a luncheon attended by representatives from seven local banks in which the SDA Director and Training Manager described all the services available to industry from the SDA and reassured the bankers that they would not be forced to hire anyone they did not want simply as a consequence of participating in the program.

The bankers came to recognize that their recruitment problems were not isolated experiences and that a co-operative program could serve the needs of the entire local banking industry.

## Employer Participation

The committee of bank representatives met on a bi-weekly basis, and through a number of subcommittees continued to play an active role in the planning, management, monitoring, and refinement of project operations.

In selecting the instructor, the DTMD staff recruited applicants and did the initial screening of resumes. Two representatives from the advisory board sat in with DTMD staff during interviews. Participation by representatives from the banks changed the character of the interviews. According to an SDA official, "[The bank representatives] asked a lot of bank-related questions that we wouldn't have asked if they hadn't participated."

To develop the curriculum, SDA staff adapted training materials from other JTPA programs and from a local community college. The advisory board then reviewed the curriculum synopsis (in a lengthy meeting), made substantial changes, and ensured that the training would meet the needs of all participating banks.

Using copies of aptitude and basic skills tests provided by the banks, DTMD staff did the initial screening. Bank representatives participated in the interviews with potential trainees. The banks also assisted in recruitment by referring to DTMD those persons who had applied to the banks for jobs and who would benefit from the program.

Various banks pooled their resources and committed their personnel for specialized instructional topics, the use of check writing equipment, training films and projectors, and the donation of supplies and materials for classroom use. Trainees toured both a savings bank and a commercial bank during the classroom phase and were made aware of the differences between them. Several banks also provided access to their trainer computer terminals. Each participating bank also accepted from one to four trainees per cycle into 20 hour per week paid internships for the final three weeks of training.
As testimony to the success of the employer involvement, one bank which was not part of the program recently called DTMD to complain that it had not been invited to participate.

# Implementation/ Replication Issues

## Unique Elements and Common Patterns

There were several unique elements in the Lawrence programs:

- The civil disorders and subsequent active role of the Lawrence mayor in initiating the Geriatric Nursing Assistant Training;
- The SDA's activities in identifying a demand occupation (bank teller) and putting together a consortium of employers to deal with it; and
- The tight labor market in the Greater Lawrence area, leading to above-average wages in many occupational groupings (e.g., over $5.00 an hour for entry-level positions in some fast food chains).

None of these elements, however, seem to limit the potential for replication of these programs in other SDAs.

The Hillhaven Geriatric Nursing Assistant Program also illustrates an important issue for SDA planners to consider: that welfare recipients and other disadvantaged men and women do not always assess the desirability of jobs in the same way that JTPA planners do. While SDA planners were somewhat disheartened by the inability of the participating nursing home to provide entry-level salaries of over $5.00 an hour, the program has *not* suffered a shortage of applicants. Indeed, many program graduates prefer to stay at the nursing home at which they were trained rather than obtain jobs in other institutions (particularly hospitals) that pay higher wages. Evidently, the accessibility of the participating nursing home to the residences of many of the trainees, and the flexible working hours provided by the nursing home management, were key factors in the popularity of these jobs.

## Issues for Further Consideration

Two problems arose during the first training cycles in both the Geriatric Nursing Assistant and Banking Assistant programs in the Lower Merrimack Valley Service Delivery Area that were at least partially resolved in the second cycle, but which still bear close attention by any SDA planning similar programs in the future. These problems involved: (a) selection of appropriate trainees, and (b) developing an appropriate mixture of classroom training and OJT.

In both the Nursing Assistant Program and the Bank Teller Program, the procedures initially used to recruit JTPA applicants led to some dissatisfaction among employers with the quality of some of the trainees. This was particularly true in the Bank Teller Program, where some of the trainees did not work out after they were placed in jobs at the end of the training period. The solution developed by SDA staff and the advisory committee was to lengthen the internship period so that the bank representatives could have more time to observe the on-the-job performance of the teller trainees before any decisions about hiring were made.

In both programs, the experience gained by the SDA and the participating employers in the first training cycle allowed them to modify the trainee selection criteria to increase the likelihood that trainees would be placed in long-term unsubsidized employment at the end of the training.

Both the Geriatric Nursing Assistant and Bank Teller Programs have been based on combining classroom instruction with on-site paid internships where trainees can get "hands-on" experience and employers can get a sense of whether or not the trainees can "cut the mustard." In both cases, assessment of the first training cycle led to decisions to strengthen the on-site internship component in the second cycle. At least in this SDA, maximizing the use of employer worksites through such approaches as internships appears to be yet another critical aspect of employer involvement in the planning and operation of the program.

## The SDA Perspective

SDA staff feel very positive about the role that area employers have played in both DOL Demonstration Grant training programs. They plan to continue incorporating many of these same features in their regular Title IIA programming, and recommend them to their counterparts in other SDAs.

Working together with employers in the development of curriculum and selection of trainees has provided SDA staff with a heightened appreciation of the way that employers look at these issues, as well as a level of technical knowledge of the two fields that would not have occurred in any other way. As one SDA official put it:

*The employer representatives conducting the interviews asked questions and raised issues that we could never have thought of, and as a result of this, we got a much better idea of the qualities that they would be looking for in a trainee—and in someone they wanted to hire.*

SDA officials also feel that the 50-50 matching requirement in the BSSC program resulted in numerous benefits besides the obvious one of allowing scarce training dollars to go twice as far. In particular, the 50-50 matching requirement, along with the other participatory elements outlined above, resulted in a sense of "ownership" of the training project on the part of employers. This, in turn, has resulted in a program which is relevant to employers' needs and which has a greater likelihood of finding placements for participants. From the SDA perspective, this means that little or no resources needed to be allocated for job development at the end of the training session.

Another SDA official summarized his support for the 50-50 matching model in the following way:

*This type of program takes a little more time and effort because of the employer involvement, but you get a better product. The training is better because of the employer involvement, and placement is greatly facilitated.*

It should also be noted that widespread employer participation may involve some costs as well as benefits. At a minimum, it can add time to the process of getting a course up and running. In the Bank TellerProgram, for example, employer participation improved the instructor selection process, but also lengthened it, so that the start of the program was delayed. Because of that delay, eight applicants dropped out of the program.

In spite of the additional time required to deal with a multi-employer advisory committee, the SDA staff prefer programs that involve several employers. Multi-employer programs have two major advantages. First, a multi-employer

program will not be hurt by an unanticipated downturn in employment at a single firm. Second, a multi-employer program can offer a greater diversity of placement opportunities.

## The Employer Perspective

The employer community has, in general, been highly positive about both the Geriatric Nursing Assistant and the Bank Teller training programs, and has sought to continue them beyond their scheduled termination. Hillhaven is now actively exploring ways to replicate this model with other SDAs in the state, and the bankers are pushing for additional training cycles. In essence, the program helps to open a new supply of job applicants where the traditional supply has been declining. As one of the participating bankers put it:

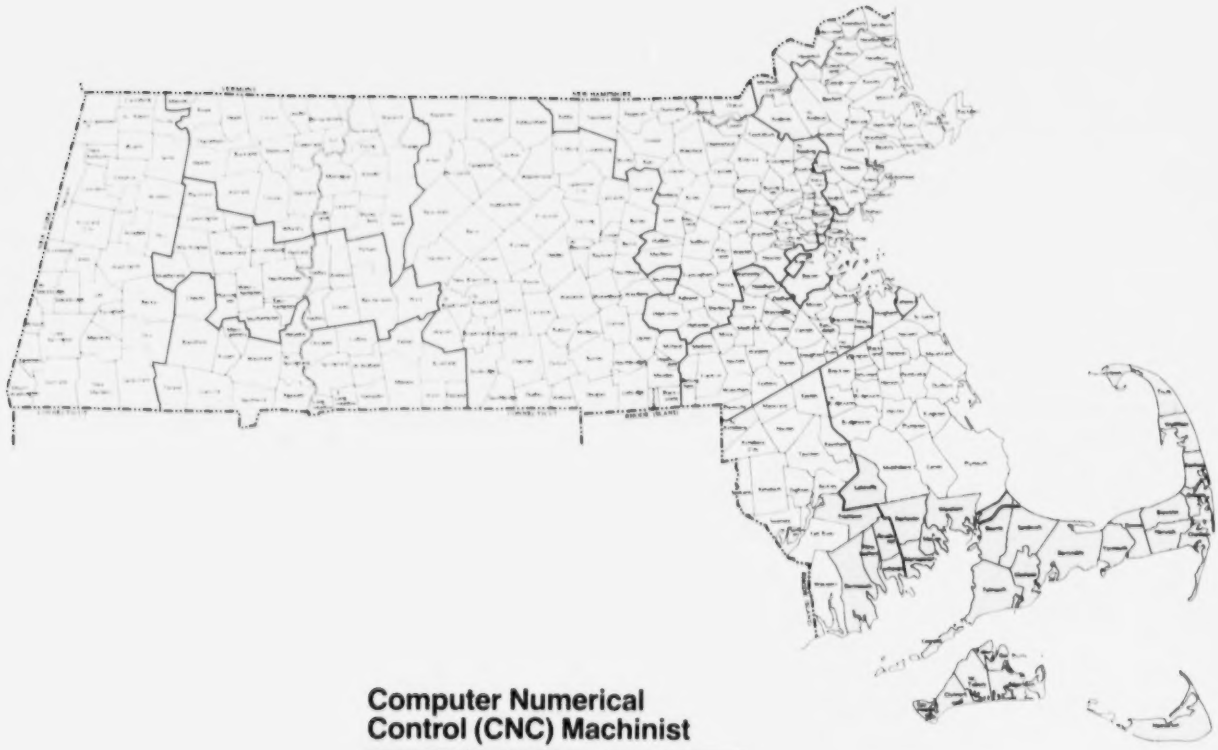
*The BSSC-funded training program has made it possible for people to get into bank teller jobs who would not otherwise have had a chance. Many of them have been on welfare or have been facing pressing personal problems, and would not have had the background to be hired without this program. Successful entry-level tellers, in turn, have ample opportunities for promotion to senior tellers and teller supervisors, and thus to better themselves substantially.*

The project is also beginning to bring benefits to the participating banks in ways that extend beyond the specific training program. In particular, the project has brought bank personnel together on a regular basis in a forum that has facilitated discussion of other issues and shared concerns.

In many ways, the "bottom line" employer assessment of the two training programs is that the participating employers have hired so many of the program completers.

# New Bedford, Cape Cod and Islands Service Delivery Area

**Grant Recipient:**
City of New Bedford
Office for Job Partnerships



**Computer Numerical Control (CNC) Machinist**

| Trainees | Entry Level | Upgrade |
|---|---|---|
| **Enrolled:** | 11 | 4 |
| **Completed:** | 9 (82%) | 4 (100%) |
| **Placed:** | 10 (91%) | 4 (100%) |

**Average Entry Wage:** $6.65

**Average Upgrade Wage:** $7.36

**BSSC Funding** $32,404

**Private Sector Match:** $90,605

**Participating Employer:**
Isotronics, Inc.,
A Division of Augat Industries

**Information Contact:**
Paul Vigeant
Office for Job Partnerships
(617) 999-3161



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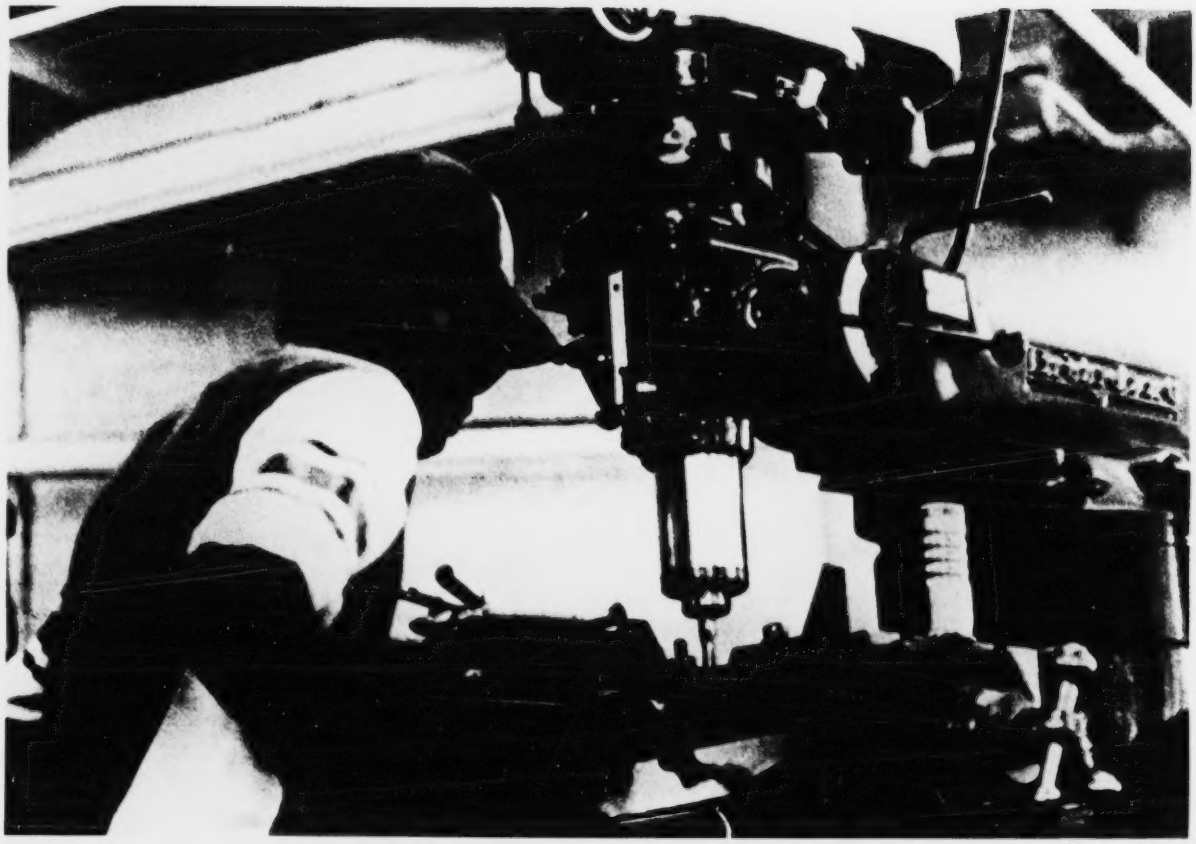
# Introduction



The New Bedford Computer Numerical Control (CNC) machinist training program has established a reputation as one of the most successful public-private partnerships in the area. Staff from the JTPA Service Delivery Area (the Office for Job Partnerships) and a "high tech" manufacturing firm (Isotronics, Inc.) collaborated in all aspects of the program: planning, recruitment of clients, training, and placement. The program model combined both classroom skills training and on-the-job training (OJT), and was designed for new hires as well as upgrading existing company staff.

The SDA decided to participate in the Department of Labor Demonstration Grant program being administered by the Bay State Skills Corporation (BSSC) because its emphasis on employer involvement coincided perfectly with the priority being given to customized training for all JTPA-funded vocational skills training activities. As a top SDA official put it:

*Our strategy is totally consistent with the BSSC approach. We both feel that training is more effective when it is tied in as closely as possible with employers. We were trying to entice businesses into our system and the BSSC grant was a good way to start.*

# Background

## The Service Delivery Area

The Office for Job Partnerships is responsible for the administration of the JTPA program in two areas of Southeastern Massachusetts: the Greater New Bedford area including an old industrial city and its suburbs, and Cape Cod and the islands of Martha's Vineyard and Nantucket.

The New Bedford area was one of the original CETA Prime Sponsors in Massachusetts; Cape Cod and the islands had been administered as a Subgrantee by the Balance of State Prime Sponsor. The two entities were merged with the 1983 implementation of JTPA.

The unemployment rate in the area has been high relative to the statewide average (7.5% as opposed to 4.3% in July 1985). As a result of this, JTPA allocations for the SDA are the second largest in the state, second only to Boston: the PY 84 allocation was $2.5 million for Title IIA, and was the basis of plans to serve just over 1200 participants.

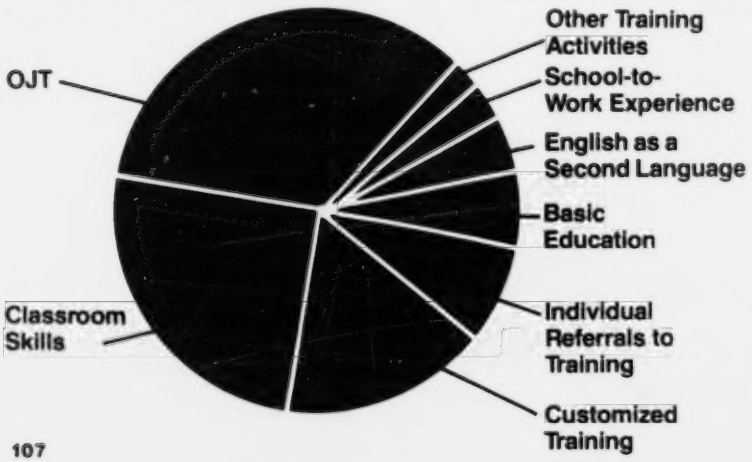
## The Labor Market

The New Bedford labor market area in which this program was conducted has gone through many changes. In the 18th and early 19 centuries, the area was the whaling capital of America; later it became a major center for non-durable manufacturing, principally textile and apparel. With the decline of the New England textile and apparel industry, the New Bedford area has experienced severe economic dislocation, but it is now evolving into a more balanced economy. Total wage and salary employment has been slowly rising in the New Bedford labor market area, and the largest single area of employment growth was in durable manufacturing.

## Overview of SDA Clients and Services

Planned enrollment for PY 1985 Title IIA programming is roughly 350 youth and 850 adults. The SDA is planning to serve substantial population segments in the following proportions:

| | |
|---|---|
| Women | 57% |
| <21 years old | 34% |
| >55 years old | 5% |
| Minority | 19% |
| Welfare recipients | 35% |
| High school dropouts | 42% |



# The CNC Machinist Training Program

## The Program Model

The program model incorporated use of the SDA's intake and assessment center supplemented by advertisements in the local newspapers, and a six month training period that combined classroom skills training and OJT in differing combinations over the passage of time.

SDA and employer staff jointly developed a set of entrance requirements for the training program, including desire to be a machinist, vision correctible to 20/20, ability to learn and understand mathematical concepts, ability to comprehend and follow written instructions, and ability to comprehend and follow blueprints and diagrams.

After an initial screening for JTPA eligibility, SDA staff provided an in-depth assessment using the Test of Adult Basic Education and the JEVS work sample.

Promising applicants identified through the assessment process were referred to Isotronics, along with written summaries of the assessments for interviews and final selection.

The training curriculum included three phases:

- Four weeks of classroom training on general machining skills, followed by
- Fourteen weeks in which training was shared between the SDA (two days a week in a classroom) and the company (three days a week of on-the-job training), and
- Eight weeks of full time training at the employer worksite.

The initial four weeks of classroom training focused on the fundamentals that would be necessary for any machinist's job, including general machining theory, blueprint reading, and relevant mathematics, as well as experience on lathes, grinders, drills, and saws. Attention was devoted to machine maintenance as well as operation.

The fourteen week second phase of training involved continuation of the basic machinist curriculum in the classroom and an on-the-job training component at the employer worksite that paid $5.18 an hour (shared equally between the employer and the program). This offered an opportunity to work on state-of-the-art machinery, that Isotronics staff were currently using, as well as training in quality control review that is done for all products at the firm.

The third phase of the program consisted of five days a week of carefully supervised OJT at the Isotronics plant.

The training model that was implemented differed from the one that the SDA and the employer had initially developed. Careful monitoring of the training by both the SDA and Isotronics revealed that the trainees were progressing more rapidly than had been anticipated. As a result, the original eight month program was cut back to six months, and the two day a week classroom training component was dropped entirely in favor of a five day a week OJT during the last eight weeks of the program.

## Developmental History

The New Bedford SDA had been emphasizing the OJT and customized training approaches for some time. SDA officials turned to their Account Executives, who were responsible for developing and overseeing OJT contracts with employers, in order to determine which firms were likely to be hiring relatively large numbers of staff and seemed otherwise appropriate for the effort.

When Isotronics management was approached by SDA staff, they were considering an expansion of their workforce and were therefore interested in pursuing the matter further. Another firm that expressed interest at the time was eventually funded to run a similar customized training program using the SDA's regular Title IIA training funds.

As noted elsewhere in this case study, the design, initial implementation, and modifications to the training program were all carried out in a true working partnership between SDA and Isotronics staff.

## Employer Participation

Isotronics management provided the majority of the funds necessary to carry out the training project, and participated as equal partners in virtually every step in the planning and implementation of the CNC machinist training program.

The Isotronics funding match included such items as trainee wages during the hands-on training at the company site, the wages of the Isotronics employee who was the CNC instructor/supervisor, time from the Isotronics personnel department, use of production floor CNC milling machines, and the stock material that the trainees practiced on.

Isotronics officials interviewed the classroom training instructor selected by the SDA and approved of this choice before the training got under way.

Isotronics staff were actively involved in the curriculum design. SDA staff presented examples of CNC and related machinist training curricula to Isotronics managers who then provided reactions, which were used by SDA staff to develop and modify the CNC curriculum.

The SDA staff spoke on the phone with the Isotronics trainer several times a week and met at least once a week in order to go over what each of them was doing, review progress to date, and problems that might be coming up with trainees. The Isotronics management reaction to the pace and content of the classroom portion of the training was the primary impetus behind the above-described modifications to the training curriculum.

# Implementation/ Replication Issues

## Unique Elements and Common Patterns

The one-on-one relationship between the New Bedford Office for Job Partnerships and Isotronics has been replicated with at least a half dozen other firms, using JTPA Title IIA funding. New Bedford officials find this approach to be much easier to manage than consortia, and have adopted it because they have been able to find single firms that are willing to consider hiring the entire trainee group. Both the SDA and Isotronics staff feel that customized training provides trainees with skills that are generic enough to be transferrable to other companies.

The Isotronics willingness to contribute more than a 50% match has also been replicated with other companies. SDA staff cite examples of employer willingness to share in training costs even when it is not formally required. For example, another machinist training program run by the SDA combines classroom training and OJT, and the company put up $20,000 in client stipends for the classroom training segment of the program.

As one SDA staff member put it:

*A fifty-fifty match, or even more, is not hard if you can offer the employer the right things in return and if you can work with the employer to put it together...As a matter of fact, after we reached our agreement with them about the size of the match, we realized that we needed to purchase some additional equipment for the in-house (classroom) portion of our training. Isotronics staff simply said, 'Give us a list of what you need and we'll get it for you.'*

Finally, the Isotronics experience suggests that men and women who are eligible for JTPA Title IIA programs may have a wider potential to meet the needs of sophisticated high tech manufacturing firms than has often been realized. The CNC machinist site housed the most sophisticated equipment and most complex jobs at the firm: hybrid packaging of glass to metal seals for micro-circuits, using machinery whose costs are as much as $100,000 per unit. JTPA trainees are now valued employees at this site.

## The SDA Perspective

The SDA has been highly satisfied with the Isotronics training program and has customized training using Title IIA funds with numerous other employers in such fields as building maintenance, basic metal working, surgical instrumentation, and the manufacture of oceanographic instruments.

As an SDA official put it:

*Over time, we'd like to be doing customized training exclusively. Everything we do in the training area has to be linked with employers, and this fits in with our broader economic development orientation.*

SDA managers believe that combining classroom training and OJT is a good design for training programs, but they feel that the specific ratio of classroom training to OJT should be adapted to the needs of particular employers and groups of trainees. In general, this design transmits theory and hands-on skills in the classroom and reinforces them on the company site; moreover, it enables trainees to meet their needs for income which cannot be met with training allowances since JTPA does not authorize them.

SDA officials believe that they have learned many useful lessons from their experience with Isotronics and other customized training programs. The first is that one must be careful about the companies with whom one works. There may be some firms who wish to take advantage of customized training without being willing to provide jobs with decent pay and/or advancement potential or to adhere to enlightened personnel practices. SDAs should stay away from them.

A number of lessons involve planning and project oversight. SDA officials have found that it is important to make sure that there is enough lead time to plan, and that proper planning must incorporate efforts to identify and gain access to the right people in the company. For the most part, this means that good links should be established with both the personnel department and those who directly oversee production.

Based upon their experience with the Isotronics and other customized training efforts to date, SDA management has concluded that it is important to employ project managers who have an appreciation of both the technical requirements of the training and the diplomatic skills to maintain the confidence of all parties.

Finally, SDA officials feel that the Isotronics program has resulted in intangible benefits as well as tangible ones. As one of them put it:

*We are facing a major challenge to separate ourselves from the CETA model and the CETA image in this area. Having a model that is based on working with employers to meet employer needs is very helpful in this regard.*

## The Employer Perspective

The SDA's BSSC-funded customized training initiative came along at an ideal time from the point of view of Isotronics. In order to meet the demand for high quality products within tight time deadlines, the firm needed to add a second and third shift. Company policy does not permit "pirating" skilled staff from other firms and there were few job applicants in the area with the necessary skills. Therefore, a new kind of training was needed, but there was no in-house expertise in how to put such training together. As an Isotronics official put it:

*You simply can not find enough skilled people to operate CNC machinery these days... We couldn't meet the demands of our customers. There was a substantial business potential for expansion if we could hire extra staff, because there was strong demand and our reputation in the field was good. The question was, could we meet the time constraints posed by our clients? The issue was timing: no one can do things better than us.*

Although it is difficult to know whether this pattern is typical of other major employers, it seems noteworthy that Isotronics managers report that the standards that the SDA set for the trainees that they referred to the firm were higher than the company's. Isotronics upgrades would not have been selected if they had been subject to the SDA's selection criteria.

As Isotronics management sees it, the trainers are the key to the success of a program like this:

*The program worked because the Isotronics trainer that we used, our first line supervisor, is an outstanding instructor. It simply can't work without an outstanding instructor.*

Isotronics managers believe that both the process and outcomes of the training programs have been favorable. The outcome speaks for themselves: all thirteen program completers were hired by the firm, ten of them in the specific "machine module technician" job that was the subject of the training, and three in less skilled positions such as inspectors. As one Isotronics manager put it, "We have tried to find a place for all completers who have demonstrated the potential to work here—virtually everyone."

They also speak positively about the process through which the training was planned and implemented:

*The kind of marriage between a training agency and a company that took place at our firm was a good one. You wouldn't want a company to handle everything. The SDA training was focusing on making sure the clients understood the needs of industry and the demands of a company, and on general training, while our own staff provided the technical skills needed to work here.*

*Company staff are not as good as others in things like teaching basic mathematics or more generic instruction. Also it is less disruptive of our ongoing operations to have the basic training at a site other than our firm.*

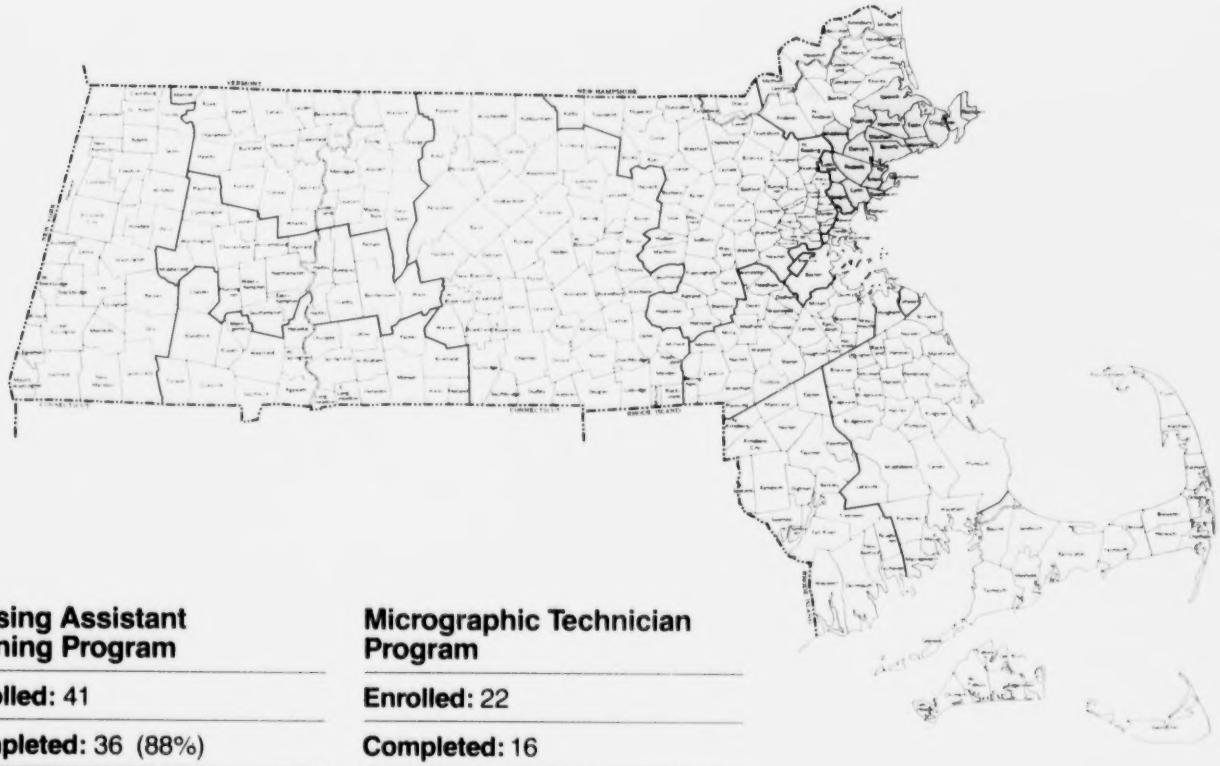
As in the case of the SDA, Isotronics managers feel that their participation in the program has brought them intangible as well as tangible benefits:

*The training was good community relations for the company. Also, combining the training for new hires with our offering an upgrade opportunity for others shows the good faith commitment of the company to its existing staff, as well as providing more openings for entry level staff to fill. The upgrading also helps to promote attachment to the company on the part of the trainees.*

The "bottom line" of a company's assessment of a training program is whether or not it would use it again if there were similar needs to fill. According to Isotronics management, the answer in their case is a resounding "Yes."

# Southern Essex County Service Delivery Area

**Grant Recipient:**
City of Lynn
Northshore Employment and Training



| Nursing Assistant Training Program |
|---|
| **Enrolled:** 41 |
| **Completed:** 36 (88%) |
| **Placed:** 29 (71%) |
| **Average Entry Wage:** $5.05 |
| **BSSC Funding:** $57,341 |
| **Private Sector Match:** $79,001 |
| **Participating Employers:** Shaughnessy Rehabilitation Hospital; Salem Hospital |

| Micrographic Technician Program |
|---|
| **Enrolled:** 22 |
| **Completed:** 16 |
| **Placed:** 15 (68%) |
| **Average entry wage:** $4.65 |
| **BSSC Funding:** $65,991 |
| **Private Sector Match:** $69,213 |
| **Contractor:** United Cerebral Palsy Association |
| **Participating Employers:** Information Protection Services Corp.; Bell and Howell; Essexbank; Essex Office Associates; Connolly Data Systems, Inc.; Industrial Management Systems; Security National Bank; Parker Bros.; Gillette Co.; Eastern Savings Bank; Sylvania, GTE; |

**Information Contacts:**
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United Cerebral Palsy Association
(617) 593-2727



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# Introduction

Northshore Employment and Training (NET) operated two training programs under the Department of Labor Demonstration Grant Program. The first was a Nursing Assistant Program developed in cooperation with two local hospitals. The second, a program to train Micrographic Technicians, was developed and operated in association with the United Cerebral Palsy Association, a community based organization targeted to serving the needs of the physically handicapped. Because services for the Micrographic Technician program were not provided by the SDA directly, this case study offers the opportunity to compare two types of service delivery. Each has its own strengths, and both programs have been well received by the SDA and the associated employers.

# Background

## The Service Delivery Area

The Southern Essex County Service Delivery Area, also known as Northshore Employment and Training, serves nineteen cities and towns on the north shore of Massachusetts. At the southern end of the SDA are some of Boston's inner suburbs—old industrial cities with a high concentration of economically disadvantaged persons. At the northern end of the SDA are the picturesque fishing port of Gloucester and the artists' colony of Rockport. Running through the middle of the SDA is Route 128, "America's Technology Highway." Many of the cities and towns along this beltway have enjoyed the prosperity of the Massachusetts' booming high-tech industry. Some of the SDA's communities, e.g. Salem, also have a rich history dating back to Colonial times. Others, like Prides Crossing in Beverly, are among the wealthiest of Boston's bedroom suburbs. Northshore Employment and Training (NET), formerly the Salem Area Employment and Training Administration, became a CETA Prime Sponsor in 1979. Prior to that, it had been part of the Balance of State Prime Sponsor. In 1983, it became a Service Delivery Area under the Job Training Partnership Act.

## The Labor Market

The SDA labor market includes both older, declining industries and the Massachusetts high-tech and service related industries. According to the SDA's FY '86 Plan, three industries account for almost 90 percent of the employment in the SDA: Wholesale/Retail Trade (34 percent), Manufacturing (30 percent), and Services (24 percent). Manufacturing and Wholesale/Retail Trade have larger shares in this SDA than they have elsewhere in Massachusetts. In terms of growth patterns, manufacturing has enjoyed an upsurge since 1982, but is now leveling off, and the Services sector has enjoyed steady growth in the past ten years. Unemployment in the SDA has been consistently lower than the rest of Massachusetts. At the end of 1985, the rate for the SDA was less than four percent. This has presented a new challenge to the SDA program designers, as the people who are eligible for services under JTPA are more severely disadvantaged, with lower academic skills and poorer work histories, than was the case in the past.

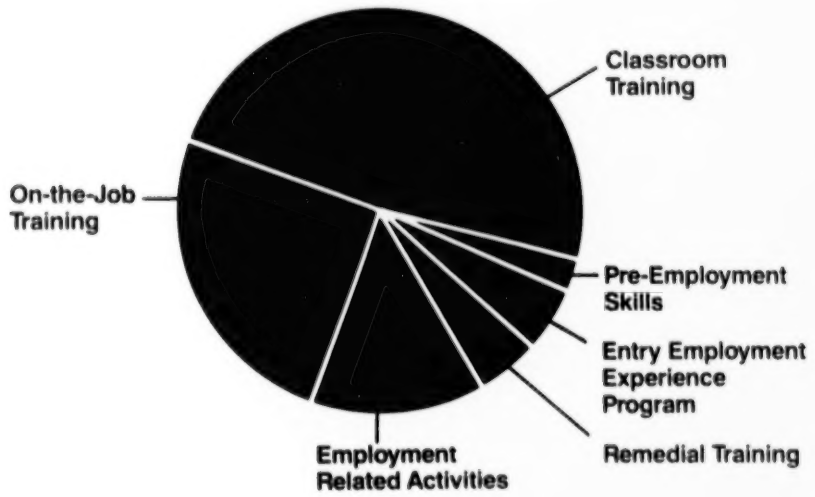
## Overview of SDA Clients and Services

Over 50,000 people aged 16 and over are JTPA eligible in the service delivery area of NET. The following chart summarizes the characteristics of the JTPA eligible population and the population served by Title IIA (According to the FY '86 Plan) The high percentage of high school dropouts in the eligible population has become a problem for the SDA since most of the employment growth in the region is occurring in the high-tech sectors which generally require higher levels of education and training.

| | JTPA Eligible Population |
|---|---|
| Female | 64% |
| <21 years old | 22% |
| >55 years old | 33% |
| Minority | 4% |
| High School Dropouts | 44% |
| WIN Registrants | 3% |

### Allocation of SDA Training Expenditures

Most of the SDA's services are provided by in-house staff. Very few services are contracted to schools or community based organizations. The Service Delivery Area does its own recruitment and assessment of applicants, and employs Counselors, Job Developers and Classroom Instructors. Amongst the training programs historically offered by NET are clerical business office procedures, electronic assembly, and vocational English as a Second Language with Data Entry.



# Nursing Assistant Program

## The Program Model

The Nursing Assistant Program provided introductory training in the nursing, physical therapy, and phlebotomy assistant areas in three 14-week cycles to a total of 41 trainees. Within each cycle, the training was divided into two phases. Phase I involved eight weeks of classroom and clinical training; Phase II involved six weeks of additional training in an area of specialization such as phlebotomy, EKG, physical therapy, and occupational therapy.

Training was conducted in a classroom on the acute care floor at the Shaughnessy Hospital. This donation made it possible to illustrate nursing care procedures as they were introduced in the curriculum while orienting the trainees to the environment in which they would be working. The curriculum covered Introductory Anatomy and Physiology, Health Care Skills, including CPR, and Clinical Training. The course was taught by a Registered Nurse with assistance in clinical supervision by nursing staff from the hospital, and guest lectures by technical specialists such as Respiratory Technicians, Dieticians, and Phlebotomists. Instruction, which was thirty hours a week, became increasingly clinical as the course progressed. By the end of Phase I all graduates were certified Home Health Aides as well as Nursing Assistants. The top half of each class was eligible for more intensive training as either an EKG Aide, a Phlebotomy Assistant, or a Physical/Occupational Therapy Aide. For six weeks these trainees were assigned to a mentor in the specialty area who supervised their acquisition of clinical skills. One period a day was spent in the classroom continuing the study of Anatomy and Physiology, and the rest of the time was spent in clinical practice.

The program was open to all Title IIA eligible applicants in the SDA, but special emphasis was placed on recruiting AFDC recipients. To locate potential trainees, NET staff used their network of connections with community-based organizations and feeder programs. Forms of recruitment included newspaper advertisements, notices in church bulletins, flyers, and direct contact methods, such as presentations at libraries. Shaughnessy Hospital assisted in recruitment by sending to NET applicants who were in need of intensive training before they would be considered for employment. Because of the comparatively low unemployment levels in the SDA, applicants for training were far less job ready in terms of academic skills and day care and transportation needs than the labor force at large.

Throughout the training both the instructor and the counselor emphasized professional ethics and good work habits. This was considered essential since most of the trainees had no work history. By the time for job search, trainees understood the need for appropriate dress, punctuality and good attendance. This paid off in job offers. Almost all of the placements were at one of the participating hospitals, which offered graduates of the training starting salaries equivalent to employees with two years experience.

## Development History

The Nursing Assistant Program built upon a previous training program for AFDC recipients that had been developed in 1983 in conjunction with Shaughnessy Rehabilitation Hospital. The Executive Director and the Director of Nursing at Shaughnessy both saw the need for this type of training and were instrumental in stimulating development of the program. The Executive Director of Shaughnessy also served on the SDA's Private Industry Council, thereby helping to facilitate coordination between the SDA and the Hospital.

According to SDA staff, the Executive Director of Shaughnessy Hospital "helped to organize all of the players" who needed to be coordinated for the grant application. Staff from Shaughnessy explain their participation very simply:

*If the SDA weren't doing it, we'd have to do it anyway. Our match is almost equal to what we would have spent if we did it alone. Since we can use this program as a major way of recruitment, we can get out of the recruitment business.*

NET staff wanted to recruit other hospitals in addition to Shaughnessy, not only to provide other employment opportunities for their trainees, but also to provide guest lecturers. To facilitate outreach to additional partners, NET staff asked the Director of Nursing at Shaughnessy to identify likely candidate hospitals. Using this mechanism, NET staff were able to attract Salem Hospital and include it as a site for Phase II phlebotomy training.

## Employer Participation

The primary source of private sector support for this program came from the Shaughnessy Rehabilitation Hospital, a city-run hospital in Salem, with additional participation from Salem Hospital. The Executive Director and Director of Nursing at the Shaughnessy assisted in the design of the program and the development of the curriculum. Nursing staff participated in the selection of trainees from the pool referred from assessment, and personnel from both hospitals referred any individuals who applied directly for employment but did not meet the hospitals' hiring standards. Shaughnessy Hospital provided classroom space for the duration of the program, as well as training supplies, telephones for staff, and physicals for all the trainees. The hospital was involved throughout the program in further curriculum development, periodically monitoring the skills being taught, and offering advice on job prospects.

The equipment utilized for training and donated by Shaughnessy included glass thermometers, walkers, geriatric chairs, lapboards and splints, beds, bed linen, bedpans/urinals, admission kits, blood pressure apparatus, siderails, restraints and trapezes, diabetic urine testing equipment, diet trays, EKG machine, phlebotomy equipment, manekin, needles, miscellaneous CPR equipment, basins, lotion/powder/soap, Foley catheter equipment, enema equipment and oral hygiene equipment. These donations made it possible for the trainees to practice their skills using current equipment and techniques not generally available to schools.

In addition to the support from Shaughnessy Hospital, the Beverly Hospital, J.B. Thomas (Peabody) and Salem Hospitals as well as the Salem Home Health Aide Association donated guest lecturers to the program. Local health industry employers were involved in job counseling and job placement through presentations, mock interviews, job fairs, etc. Additional hospitals, nursing homes, and laboratories assisted throughout the program by providing field trips and other program participation so that the trainees were exposed to the full range of employment options available to them as a consequence of their training.

Shortly after the start of training, a new Executive Director and new Director of Nursing were appointed at Shaughnessy Hospital. The new Executive Director, in his previous capacity as the hospital's Fiscal Director, had been involved in the development of the proposal for the program and he remained

supportive. The new Nursing Director had not been involved in the proposal. For the first few months after her appointment, she was critical of the program's operation.

The new Director wanted to go "by the book" in all respects. This meant, for example, that she wanted nursing assistants to have a high school diploma or its equivalent, a criterion that had not been important to her predecessor. Also, she required that there be full-time supervision whenever there were trainees on the premises. These (and related) concerns created a period of uncertainty at the end of the first cycle, while NET staff met with the new Director of Nursing to decide upon remedies for each issue. On the issue of educational criteria for trainees, NET agreed that all trainees who did not have high school diplomas or GEDs would enroll in GED programs during their training. In the end, all issues were resolved, as evidenced by the Shaughnessy Hospital's participation in another training program in 1986.

# The Micrographic Technician Program

## Program Model

In conjunction with the United Cerebral Palsy Association of the Northshore (UCP), NET conducted two 20-week cycles of training for 22 JTPA eligible handicapped individuals. The program prepared trainees for employment as Micrographic Technicians, a job title referring to persons who operate microfilming and related equipment. Consistent with the expertise of the UCP, recruitment was targeted at physically and mentally handicapped persons.

As the training staff and NET discovered, there is more to being a Micrographic Technician than simply learning how to operate microfilm equipment. The job includes not only microfilming, but also preparation of a complete document for computer-assisted retrieval. This means that the trainee must also learn how to operate word and data processing equipment used to describe, document, and store microfilmed information.

The Northshore Service Delivery Area shared responsibility for the delivery of this program, a break from their usual approach of running all programs themselves. The primary responsibility for recruitment, selection of instructional staff, development of the curriculum, delivery of the training, and placement was delegated to UCP. The role of NET was primarily one of administration and oversight. UCP staff kept NET informed of all important developments in the program, and for key decisions (e.g., selection of trainees), NET staff usually were invited to participate and provide advice, along with the private sector partners.

UCP took the lead in recruiting trainees, using press releases, public outreach through church bulletins and flyers, and other traditional recruitment mechanisms. UCP staff developed a program for assessment of potential trainees, which included wide range achievement tests, a typing test, and a filing and sorting test. A committee composed of the instructor, vocational counselor, plus other representatives from NET and the private sector selected trainees. All applicants were interviewed to assess their desire to work and willingness to forego dependance on government financial support as well as their understanding of the nature of the jobs for which they were preparing.

The instruction consisted of 530 hours of classroom instruction, supplemented by 70 hours of internship. The curriculum was divided into three sections: computer skills (particularly word processing); microfilm skills (camera work, the film process, and development of microfilm and microfiche); and job readiness training. Using equipment provided by participating employers, the trainees were able to work in a simulated environment at the training site.

During the internships the trainees had an opportunity to use more sophisticated and newer equipment than was available at the training site. Each trainee was required to be interviewed by at least two potential internship sites, after which the Project Manager and Instructor met with company personnel to decide upon the final assignments of trainees to internship sites. Internships were not paid and consisted of closely supervised work experience in as many aspects of a micrographics department as possible.

## Developmental History

The idea for this program originated with an employer who had been hiring handicapped persons as micrographic technicians for several years. The employer thought that a training program designed to teach handicapped persons to be micrographic technicians would benefit both employers and the handicapped population, and she sought support for the concept from UCP. UCP took the idea to the Private Industry Council which gave it strong support.

Once approval was obtained, UCP further developed the program. The first step, and one which was very successful, was securing the support of the private sector for equipment donations and internships. UCP staff engaged in direct marketing to firms, both in person and on the telephone. The Program Manager from United Cerebral Palsy took advantage of several resources to gain introductions to new companies, including references from the original interested employer, PIC members, and family members of clients of the UCP. Within a few weeks, they had lined up more than a dozen firms who were committed to providing equipment, accepting trainees as interns, or providing other types of support. Next, UCP hired an instructor and a job counselor. These two professionals, working with NET staff, developed a curriculum. They also began to learn from participating employers about the possible job opportunities for micrographic technicians, which are not limited to microfilming, but include a full range of tasks involved in storage and retrieval of microfilmed documents. This market information contributed to the curriculum development.

## Employer Participation

Company participation in the development and delivery of this training was extensive. The private sector donated training equipment, personnel for classroom instruction, curriculum development, and internship supervision. UCP, in conjunction with Northshore Employment and Training, involved all of the partners into a cohesive Advisory Board. The function of this Board was to reinforce the corporate emphasis to the training by: setting standards for admission to training that were consistent with employment standards; review of the training curriculum; review and oversight of the progress of training; assisting the program in upgrading its equipment; aiding program staff in diversifying their private sector sponsors; and identifying potential job openings for program completers.

In the selection of an instructor, the Advisory Board provided direction, but left the actual decision to the UCP. When it came to designing the curriculum, however, the employers were much more active. One of the most active employers prepared an entire first draft. Others helped to give direction to the curriculum by suggesting specific types of skill training, or by explaining what they were looking for in new hires.

The Bell and Howell Microfilm Products Division donated rotary and planetary cameras to the project, and also contributed staff time for training and consultation on camera use. This activity was shared by Information Protection Services Corporation, which also donated training supplies to the program. Wang Laboratories contributed a System 30 Word Processor, 9 work stations and 2 printers to be used for Data Entry training. Connolly Data Systems Inc. contributed an Atlas main frame computer, along with four terminals and an instructor for 30 hours. In addition, Industrial Management Systems provided 180 hours of instruction and consultation to the program.

# Implementation/ Replication Issues

## Unique Elements and Common Patterns

The Salem programs had several unique elements. The Nursing Assistant Program had been operated by the SDA in the past, and was an elaboration of an existing model in which the private sector participation was increased. SDA's in other states might be well advised to build upon successful models when developing new ideas for private sector partnerships.

The Micrographic Technician Program was initiated and developed by a private company working with UCP. NET staff had responsibility in terms of their grantee relationship with BSSC, but little authority for design and implementation of the program. This was a situation that the SDA had not faced before, and SDA staff learned from it. The basic lesson, according to SDA staff, is to define roles carefully in advance, rather than letting roles evolve in the pressure-filled environment of an on-going training program. NET staff also suggest that the SDA should have a significant monitoring role in curriculum development, selection of trainees and ongoing program operations. They believe that active SDA participation in these activities improves the quality of the program.

SDA staff also point out that having another agency provide services can have its benefits. For example, SDA staff feel that the UCP program enabled them to serve a client population they may not have reached otherwise. When working with a handicapped population, it is useful to work with people who are experts in this field. As one NET staff person put it:

*There are training design issues that you just don't consider unless you have the experience. They have more experience in assessment and in the development of programs that are sensitive to the needs of this population. You need that special expertise.*

## The SDA Perspective

The SDA staff members are very positive about the concept of private sector involvement in the planning and implementation of training programs. In their view, private sector participation improves the training they provide by making it more relevant to the needs of the employers in the Service Delivery Area. Private sector participation in the two programs described above has certainly proved that point.

In the Nursing Assistant Program, the temporary disruption caused by a new Director of Nursing at Shaughnessy Hospital underscored the SDA's willingness to meet the standards of employers and the importance of open channels of communication between employers and service providers.

For the Micrographic Technicians Program, employer input was essential. One of the most active of the employers played an important role in getting this grant application started, and employer input assured that the curriculum was designed to give students the training they needed for the jobs as micrographic technicians.

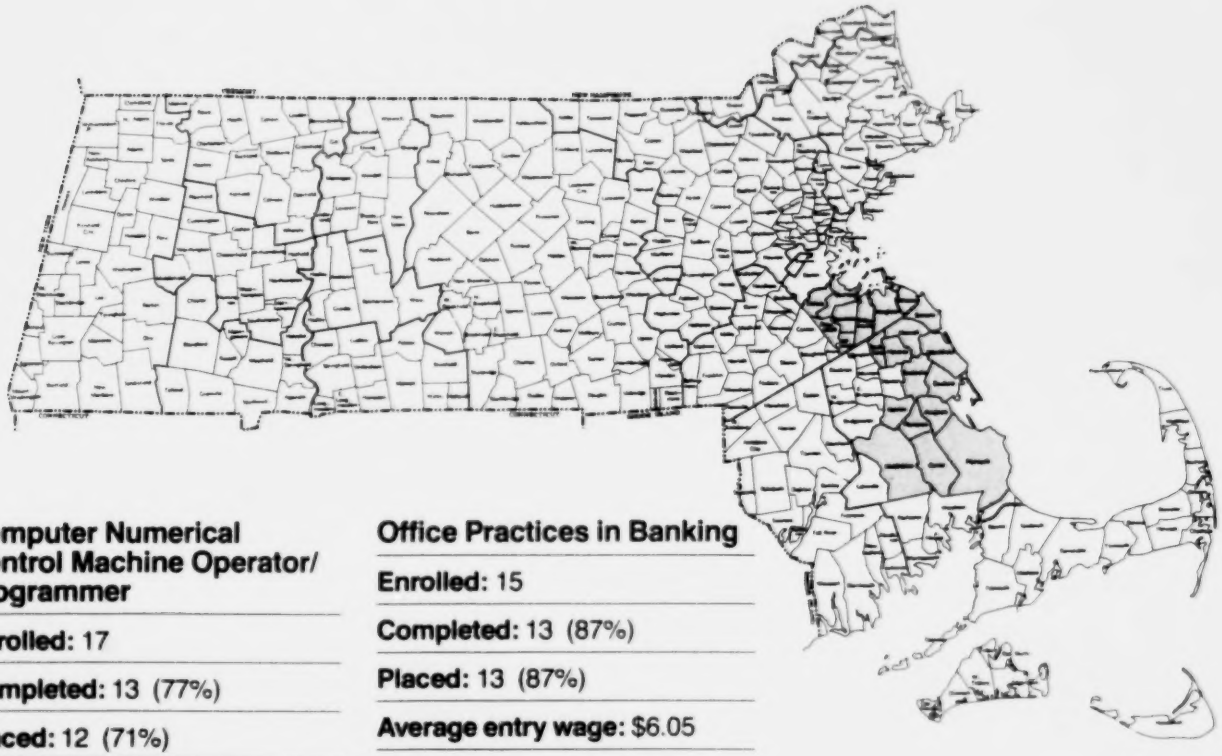
## The Employer Perspective

Although there were some problems in both the Nursing Assistant Program and the Micrographic Technician Program, employers remain positive in their assessment of both programs. In the Micrographics Technician Program, the sheer number of employers who continue to participate is testimony to its importance in their eyes. Skilled micrographic technicians are in short supply, and this program is designed to help meet that need.

For the Shaughnessy and Salem Hospitals, the Nursing Assistant Program makes economic sense. They have a need for nursing assistants, and this program not only subsidizes the training program, but it gives them substantial input into its design. As proof of the continued support by Shaughnessy for this program, the hospital has reached an agreement for another year of the Nursing Assistant Program, and it has agreed to let the SDA use the Shaughnessy logo in its recruitment literature.

# South Coastal Service Delivery Area

**Grant Recipient:**
City of Quincy
South Coastal Career
Development Administration



### Computer Numerical Control Machine Operator/ Programmer

**Enrolled:** 17

**Completed:** 13 (77%)

**Placed:** 12 (71%)

**Average entry wage:** $6.79

**BSSC Funding:** $57,140

**Private Sector Match:** $70,140

**Contractor:** South Shore Technical Institute

**Participating Employers:**
Boston Gear, Pneumatic Scale Corp., Merriman Corp., The Vulcan Co., Norfolk Conveyer, Gem Gravure, Triangle Engineering, Inc., Peterson and Nash, H.H. Arnold Co., Kentron Machine Co., Smaltren Engineering Co., Parker Hannifin Corp., Almor Tool and Die, Electro Switch, Mathewson Corp.

### Office Practices in Banking

**Enrolled:** 15

**Completed:** 13 (87%)

**Placed:** 13 (87%)

**Average entry wage:** $6.05

**BSSC Funding:** $18,080

**Private Sector Match:** $18,090

**Contractor:** Silver Lake Regional High School

**Participating Employers:**
Plymouth Home National Bank, Plymouth Five Cent Savings Bank, State Street Bank, Myles Standish Federal Credit Union, Baybank/South East, Information Technology, Inc.

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(617) 328-7300

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South Shore Technical Institute
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Stephen Nestor
Silver Lake Regional High School
(617) 585-3844



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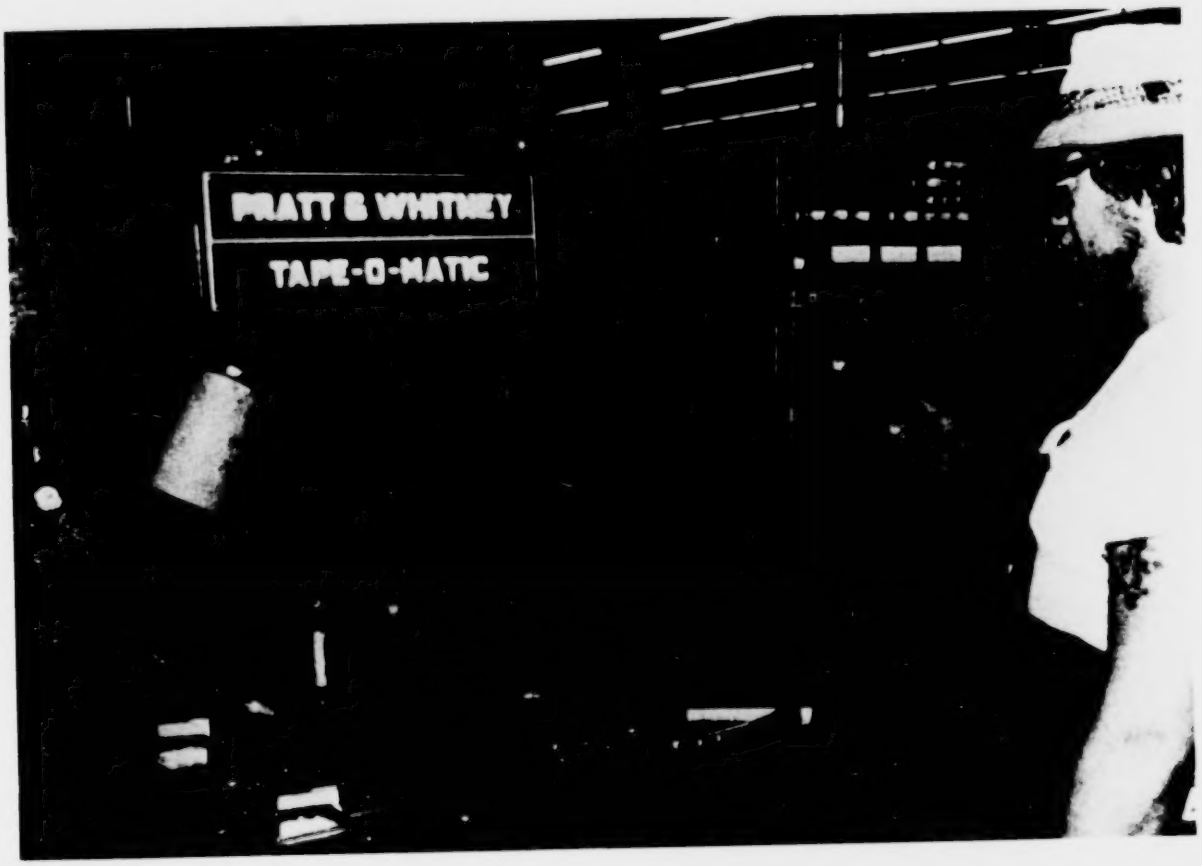
# Introduction




The South Coastal Career Development Administration (Quincy SDA) administered three training programs under the Department of Labor Demonstration Grant Program: a program for computer numerical control (CNC) machinists, one teaching office practices in banking, and one for professional chefs. The CNC program was operated by a technical institute associated with a regional vocational high school; the other two were run by the vocational education department of a comprehensive regional high school. Since the chefs' training program was still under way when this case study was prepared, the report focuses on the CNC machinist and banking programs only.

Both training programs were based on models of employer involvement that are widely supplied in the Massachusetts vocational education system. Although both experienced problems with recruitment, the PIC, SDA staff, training agencies, and employers all expressed satisfaction with the approach, which stresses heightened employer participation in the design and operation of efforts to train disadvantaged job seekers.

# Background

## The Service Delivery Area

The South Coastal Service Delivery Area serves twenty-two cities and towns on the eastern shore of Massachusetts. It stretches from Quincy and Milton, which are contiguous to Boston, southward to Plymouth, which is adjacent to Cape Cod. It represents a combination of two former subgrantees of the former CETA Balance of State Prime Sponsor: the Quincy Subgrantee and a portion of the Taunton Subgrantee. The latter had itself absorbed a former subgrantee serving the area around Plymouth.

Although the SDA has traditionally relied on its Skills Center for the bulk of its vocational training, encouragement from the Private Industry Council has led to cautious efforts to develop other models stressing use of vocational schools and greater employer involvement.

Prior to applying for the Department of Labor Demonstration Grant funds, the SDA had already conducted customized training programs with a local shipyard—the largest single employer in the SDA—and with a local bank. SDA staff reported that local employers were actively involved in planning for and oversight of courses offered at the Skills Center, donating equipment and stock, providing trainers to assist in courses, and reviewing the curricula.

PIC members and staff were a consistent force in urging the SDA to look for ways of working with employers that went beyond the framework of the Skills Center. The potential for sharing overhead costs with the vocational high schools was especially attractive for PIC members concerned with declining funds for JTPA programs. When Department of Labor Demonstration Grant funding became available, allowing the SDA to pilot test the new emphasis, PIC leadership and staff strongly urged the SDA staff to respond to the BSSC Request for Proposals.

The SDA labor market is best known for the Quincy Shipyard, which had employed a declining workforce in recent years and has recently closed altogether. About a third of the jobs in the overall labor market are in the wholesale and retail fields, a segment that has been holding steady in recent years. Three other sectors—services, government, and manufacturing—each employ about one-fifth of the workforce. The first two are showing slow growth, while the last is slowly declining.

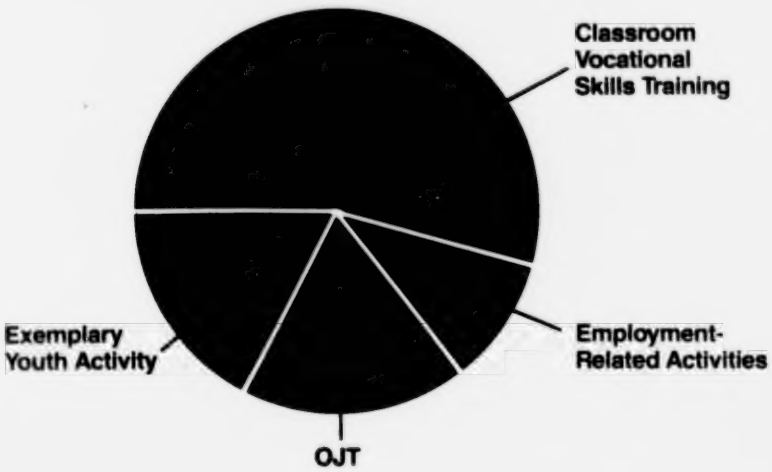
The labor market in the southern part of the SDA, where the two training programs took place, is diversified. Its major employers are in light industry (e.g. sheet metal), food service, hospitals, banking, landscaping, and tourism, the latter industry centered in the areas surrounding Plymouth Rock and nearby Cape Cod.

## Overview of SDA Clients and Services

Planned enrollment for PY 1984 Title IIA programming was 517 adults and 384 youth. The SDA planned to serve substantial population segments in the following proportions:

| | |
|---|---|
| Women | 54% |
| <21 years old | 42% |
| >55 years old | 2% |
| Minority | 3% |
| Welfare recipients | 24% |
| High School dropouts | 23% |

The following chart shows the planned allocation of PY 1984 funding for Title IIA. Note that the majority of funds were allocated to classroom vocational skills training and that no funds were allocated to remedial education, English as a Second Language, or work experience.



# Computer Numerical Control Machine Operator/Programmer

## Program Model

The CNC operator training curriculum involved twenty-six weeks of courses, given five evenings a week from 3 to 7 p.m. at the South Shore Vocational Technical High School. It was based upon existing high school course offerings and included (a) machine shop practice (incorporating manufacturing processes, machine shop lab, and manual CNC programming), (b) relate classroom training in fields such as basic algebra and trigonometry, science, and the history and terminology of CNC, (c) graphic communication skills such as blueprint reading, and (d) remedial mathematics.

In addition to the basic education and skills training elements of the curriculum, trainees also received individual and group counseling dealing with orientation to work and relations with supervisors and co-workers. They were exposed to information about alternative job prospects directly related to the skills they were being trained in, and they participated in weekly two-hour workshops addressing job seeking skills including interview skills and procedures for identifying job openings.

The training program for computer numerical control machine operators devoted a high priority to serving ex-offenders. Therefore, the outreach and recruitment activities involved considerable effort to obtain referrals from and otherwise coordinate with the Massachusetts agencies responsible for youth services and the court system. In addition, the program used such standard recruitment approaches as review of the SDA application files, advertisements in the newspapers, referrals from the state Department of Employment Security and training agencies such as displaced homemaker programs and the state welfare department's Employment and Training Choices program.

The entry requirements for the program included a tenth grade reading and math ability, "desire to participate in the program," and a number of criteria relating to ability to work independently and communicate verbally. They also specified "better than average manual dexterity, [and] an interest in fixing or maintaining mechanical equipment." The SDA screened applicants initially referring the strongest candidates to the vocational school for final selection.

Given the differing needs of local employers and the differing desires and aptitudes of clients, provisions were made to allow trainee specialization in either CNC operation or complex machine tool skills during the final weeks of the program.

Staff of the training program and the local Job Service office were involved in placement, drawing upon information obtained from participating employers about their own firms and others in the industry.

## Developmental History

The South Shore Technical Institute (SSTI) is a separately constituted non-profit organization set up by the South Shore School Committee. It shares some of the facilities and staff of the South Shore Vocational Technical High School but has its own separate budget. The high school is the oldest regional vocational technical school in the state, offering vocational programs to ninth through twelfth graders from six southeastern Massachusetts towns. Programs include a machinist program, machine packaging, heating/ventilation/air conditioning , drafting and computer assisted design, graphic arts, culinary arts, and auto body and automobile mechanics.

The SSTI training program for CNC operators and programmers was therefore able to build upon the training agency's previous experience with machinist training programs. Local machine shops, ranging in size from fewer than 20 employees to several hundred, were acquiring new computer numerical control equipment and were unable to find a ready source of personnel trained to operate it. SSTI wished to respond to their needs and retained a consultant to survey local industry and seek their participation in training. The vocational school faculty proved to be the most fruitful source of leads for the consultant, providing introductions to shop foremen and company owners who had hired the secondary school graduates. The consultant explained the desired program and the constraints that were preventing the vocational school system from offering state-of-art training in machine trades—issues which included both the cost of acquiring equipment and the rapidly changing technology. From each company he requested advisory board participation,metal stock, tools and equipment. One hundred percent of the companies approached agreed to serve on the Advisory Board, and a manufacturer who was accepting trade-in equipment agreed to donate a 5 year old CNC milling machine to the school in order to teach the basic concepts.

## Employer Participation

Local employers played a variety of roles in the development and implementation of the CNC training program. The sixteen small to medium machining companies listed on the cover page of this case study formed an advisory committee that reviewed the draft curriculum, assessed equipment that became available for the courses, and monitored overall program operations. Since the employers did not feel that any major changes were needed in the draft curriculum, the vocational school faculty felt the advisory committee had endorsed it.

Members of the advisory committee also provided supplies, tours of their plants, guest lectures, and paid internships after the completion of classroom training. Further, they agreed to inform program staff about job openings and to seriously consider hiring program graduates.

The employer match to BSSC funding consisted of the company staff time devoted to the tours, guest lectures, and project oversight; donations of equipment (a CNC lathe and CNC vertical milling machine); and free access to computers for training in programming. The employer advisory committee continued to report difficulties in finding, hiring, and retaining trained CNC operator throughout the training program. As a result, a number of the participating companies agreed to supplement the seventeen weeks of classroom training with internships that provided the opportunity for trainees to learn on more up-to-date equipment.

# The Office Practices in Banking Program

## Program Model

Using input from local banks, the Silver Lake Regional High School designed a training program to provide exposure and mastery in clerical procedures, bookkeeping, cash management, customer relations, and microfilm camera operation, as needed by the banking industry.

To recruit trainees, program organizers placed advertisements in local newspapers and public service announcements with local radio stations. They also made efforts to obtain referrals from other employment and training programs. In addition, they sent a letter describing the program home with all students in the local school system.

The training curriculum consisted of eighteen weeks of classroom training at the Silver Lake Regional High School. Classes were held six hours a day, between 3:00 and 9:00 p.m. while school was in session and between 8:00 a.m. and 2:00 p.m. during the summer vacation months.

Five part-time classroom instructors selected from the high school faculty provided training in typing, language and communications skills, introduction to computers and data processing, and accounting/bookkeeping. The curriculum was designed to stress the development of good work habits, including attendance, punctuality, and business-like dress. In a number of guest lectures supplementing the formal curriculum, banking officials described opportunities in the industry. Trainees also took half-day tours of banking facilities.

The curriculum included a mixture of both classroom skills training and "laboratory" work which became more and more intense as the program unfolded. The final component was a series of pre-employment workshops in interviewing, resume writing, and related skills. These were conducted on the high school premises by the staff of the local Job Service office.

Student progress was assessed in a variety of ways. Trainees received weekly tests or quizzes. Each month the Silver Lake Project Coordinator and their instructors evaluated them. In addition, the private sector advisory board reviewed their general progress at two points in the training.

During the final weeks of training, Silver Lake staff worked along with representatives of the Job Service to place the trainees at participating banks and other financial institutions in the area. At the close of the formal training, program completers participated in internships where they were paired off with bank employees in a "job shadowing" approach. One bank provided these opportunities to six of the trainees, two at a time for three weeks, and ended up offering jobs to two of them.

## Developmental History

The Silver Lake Regional High School serves ninth through twelfth graders in four cities and towns in southeastern Massachusetts. Its vocational education department offers training in such fields as auto body repair, automobile mechanics, carpentry, conservation/horticulture, culinary arts, distributive education, and metal fabrication/welding. In recent years, the school system has opened a night school and has begun to offer related courses to adults seeking vocational skills.

Using data from the Plymouth Industrial Development Commission, Bay State Skills Corporation and SDA staff had identified entry-level banking jobs as one possibility for a prospective training program. A consultant was engaged to visit leading banks in the area and discuss the idea of a banking practices program with key officials, primarily in personnel departments. These discussions centered on the banks' needs for entry-level personnel and the types of training that would be helpful. They also addressed employer concerns about hiring welfare recipients and other JTPA eligibles and the need to provide a substantial match for government programs. As a result of these conversations, the consultant returned to Silver Lake with the conclusion that it would be worthwhile to proceed. He also brought back more specific ideas from the banks about the content of the training curriculum.

The consultant introduced Silver Lake staff to interested bankers, helped obtain letters of support, and helped to draft the proposal. His responsibilities ended with the completion of these tasks, and program was left in the hands of the SDA and the vocational school.

The school selected training staff from a pool of business instructors known to the Silver Lake school system. Thus recruitment and screening of staff were not necessary.

Silver Lake staff developed the curriculum after meeting with bankers to determine their needs. The bankers then reviewed the draft curriculum, as did SDA and BSSC staff. Changes were made to meet the concerns of the latter two agencies. The bankers did not ask for many changes in the curriculum, however, because in their judgement, it was sound.

The Demonstration Grant requirement for employer involvement and match encouraged the training agency to reach out to the business community in a way that had not been done in the standard vocational education programs run by the school. These efforts were successful and resulted in an unprecedented level of contributions and participation.

## Employer Participation

Local banks played many different roles in the planning and operation of the training program. Most importantly, representatives of a number of them served as an advisory board for the project, providing input and overseeing its progress at key points.

Representatives of several banks provided lectures on key aspects of the business in what were called "career orientation" sessions addressing the history of and opportunities in the banking industry. Several banks provided extended tours of their worksites. These tours were designed to provide trainees with a realistic understanding of what bank teller and related jobs really entailed. In addition, employer contributions to the program included a microfilm company's donation of equipment to the school, both for this program and for subsequent courses.

# Implementation/ Replication Issues

Both Silver Lake staff and some of the banking trainees were disappointed by the smaller than anticipated number of full-time openings in banks at the close of the office practices program. Given the involvement of bankers in the planning of the program, future miscalculations of this kind are unlikely.

Silver Lake officials believe that the timing of the program—training during the summer months with placement in the fall—also hampered their efforts at obtaining training related placements in an industry whose greatest demand is in the summer months, due to heightened demand from tourists and the need to replace staff who are on vacation. It is important to consider such seasonal vacation in the labor market when planning any skills training program.

## The SDA Perspective

Both SDA and PIC personnel feel positively about the employer involvement in the planning and implementation of training programs. In the words of one SDA staff member:

*Private sector involvement is the way to go. The concept is a good one, but it is important not to limit training agencies and SDAs to a single model. The idea of substantial involvement is certainly a good one.*

Fixed matching percentages were opposed on practical as well as theoretical grounds: the SDA claimed limited monitoring capacity and stated that the fifty-fifty match provision provision required it to develop and maintain such a capacity to make sure the commitment was being met.

BSSC firmly believes that a strong monitoring and/or technical assistance presence is essential to the success of training programs, and should be a priority among SDAs or others operating vocational training programs.

Nevertheless, SDA staff acknowledged that the rules of the BSSC program forced them to move to a higher level of private sector participation in training than they would otherwise have done, and that this has been good for the programs.

PIC members and staff indicated that they were pleased with both the opportunity to participate in the DOL Demonstration Grant and its results. As one of them put it:

*The DOL Demonstration Grant was an excellent vehicle for the direction that the PIC had been pushing the SDA towards for years. Its results show that this approach is practical and effective.*

## The Training Agency Perspective

Both the South Shore Training Institute and Silver Lake Regional High School staff were pleased with the results of their efforts to incorporate the BSSC matching grant model into the vocational education system. As noted above, one of them had already begun a second training program using this model, and the other was considering applying for more funding to do so.

Both vocational schools have employer advisory committees in all of their vocational programs because Massachusetts legislation requires it. However, the involvement of employers for the DOL Demonstration Grant program went far beyond the standard functioning of an advisory committee, in large part because of the requirements of the grant from BSSC.

Both training agencies believed that there were major benefits to their programs from the extensive employer involvement and contributions. As an official from one of them put it:

*Even if there were no strings attached to funding for training programs that we receive, we'd still go out to industry for materials, for field trips, for demonstrations, and so forth. . . . Given the need for entry-level staff, industry has shown that it is willing to provide resources for training programs.*

On the other hand, training institution staff saw limits to a strategy that relied exclusively on donations from employers. For example, a manager in the CNC program noted that donated equipment is often not up-to-date, and he would like to obtain funds to purchase new equipment. BSSC acknowledges this problem but has found that industries encountering a skilled labor shortage will frequently lend state-of-the-art equipment to schools for the duration of a training program, or will make their facilities available for specialized training. It is rarely cost effective to spend limited training funds on capital equipment that frequently is obsolete in three years.

Both training institutions saw possible longer-term benefits to their schools as a result of the employer involvement in the DOL Demonstration Grant program. The relationships that one of the schools developed with local employers resulted in two tuition-paying classes for upgrading current employees. Managers in the other school hoped to translate the employer involvement in the demonstration program into ongoing participation of these firms in the oversight of their business curriculum.

According to one of the schools, the involvement of the private sector in the design and operation of the training program was even better than had been expected on the basis of formal commitments. Officials at this school believed that the ultimate impact of the program was to allow the school to "to look within itself for additional capabilities to provide skills training to more and different groups of people who need skill training and to specific industries who may require skilled personnel."

## The Employer Perspective

Employer perspectives on the two training programs were inevitably affected by their own experiences with trainees. However, even though this was their first experience with government-funded training programs, they had almost universal praise for the general approach that called for getting their firms involved in the design and conduct of the programs.

A number of employers felt that they would like to play a more active role in similar programs in the future. They expressed interest in learning more about the training activities . Some would consider a more active role in the classroom, teaching some topics and possibly playing a role in the screening of potential trainees before they came into the program.

A number of employers concurred with the training agency staff who asserted that it was difficult to provide sophisticated training programs on topics such as CNC machine operation when training institutions do not have the state-of-the-art machines that employers are using. They recognized that donated equipment was unlikely to be state-of-the-art, and therefore would welcome any program that provided funds to the training institutions to purchase new machinery.